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ABSTRACT

A summary of educational planning methodologies tested in Argentina, Guatemala, Brazil, Ecuador, and Bolivia, the document offers opinions and proposals about integrated rural development. Integrated rural development is seen as a social, economic, political, and cultural process in rural areas, designed to improve living conditions. Chapters address: (1) the present situation, new approaches, and trends for education and the socio-economic context in rural areas of Latin America and the Caribbean; (2) elements to consider in the characterization of rural areas (such as ecology, population composition and dynamics, structure of property and power, work and income, social organization, communications, and levels of welfare) and options of response by the education sector in depressed and modernized areas; (3) the role, levels, and limitations of educational planning and their integration with other sectors responsible for rural development; (4) conditions and characteristics of the educational planning process including community participation and consultation; (5) main components of the educational planning process (component identification, program area pre-diagnosis, global and sectoral plan study, sectoral objective formulation, education structure determination, programming, implementation, project formulation, evaluation, and control); (6) elements for formulation of educational strategy. The document concludes with an extensive multilingual bibliography. (NEC)

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Reports
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EDUCATIONAL PLANNING METHODOLOGY FOR THE INTEGRATED DEVELOPMENT OF RURAL AREAS

By

Unesco Regional Office for Education
in Latin America and the Caribbean
(OREALC)

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By

Unesco Regional Office for Education
in Latin America and the Caribbean
(OREALC)

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FOREWORD

Unesco's General at its 19th session (Nairobi, Kenya, 1976) resolved that the Secretariat give particular attention to "gathering and disseminating information about new educational policies for the renewal of educational systems adapted to specific needs on the basis of particular social, economic and cultural situations and aimed at promoting democratization of the systems within the framework of life-long education" (Programme Resolution 1.111).

In line with this mandate the Division of Educational Policy and Planning began in 1977 reproducing selected technical papers and distributing them as a series under the general title: "Reports Studies...". The aim of this series is to stimulate reflection and discussion on current issues confronting educational policy-makers, planners, administrators and school architects. Distribution is limited to Unesco officials at Headquarters and in the field as well as interested technical personnel in governmental and private institutions. It is hoped that this series will promote and serve as a vehicle for increasing communication between individuals and institutions concerned with policy and planning aspects of education.

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La Conférence Générale de l'Unesco, lors de sa 19e session (Nairobi, Kenya, 1976) a décidé que "la collecte et la dissémination de l'information sur les nouvelles politiques d'éducation pour le renouvellement et la réforme des systèmes d'éducation adaptés aux besoins spécifiques basés sur des situations sociales, économiques et culturelles particulières et qui ont comme objectif la démocratisation des systèmes dans le cadre de l'éducation permanente" (Résolution 1.111 du programme) se situent parmi les objectifs prioritaires de l'Organisation.

Conformément à ce mandat, la Division des politiques et de la planification de l'éducation a entrepris en 1977 la reproduction et la distribution de certains documents techniques, sous le titre général de "Rapports et Etudes..." Cette série a pour objet de stimuler la réflexion et les discussions portant sur les problèmes courants auxquels douvent faire face les décideurs, les planficateurs et les administrateurs de l'éducation ainsi que les architectes scolaires. La distribution de limite aux professionnels du Siège et hors-Siège, ainsi qu'aux personnels d'institutions gouvernementales ou privées susceptibles de les trouver utiles pour leur travail. Nous espérons que cette série constituera un moyen pour promouvoir et augmenter la communication entre les individus et les institutions concernés par les différents aspects des politiques et de la planification de l'éducation.

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La Conferencia General de la Unesco, en su 19a. sesión (Nairobi, Kenya 1976) resolvió que la Secretaría prestara un atención particular al acopio y la difusión de informaciones relativas a las nuevas políticas educativas para la renovación y reforma de los sistemas de educación adaptadas a las necesidades nacionales específicas basadas en las situaciones sociales, económicas y culturales particulares y destinadas a promover la democratización de esos sistemas dentro del marco de la educación permanente. (Resolución 1.11 del program).

En conformidad a ese mandato la División de Políticas y Planificación de la Educación comenzo en 1977 a reproducir trabajos técnicos seleccionados, y a difundirlos en una serie, que tiene el título genérico de "Informes y Estudios". La finalidad de esta serie consiste en estimular la reflexión y la discusión sobre problemas corrientes que deben afrontan los que toman decisiónes, los planificadores y administradores de la educación así como los arquitectos especialistas en construcciones escolares. La distribución de esta serie está limitada a los especialistas de la Unesco, en la Sede y en el terreno, así como el personal de instituciones gubernamentales y privadas para los que ésta puede ser de cierta utilidad. Se espera que está puede ser de cierta utilidad. Se espera que está serie promueva y sirva de medio para la comunicación entre especialistas e instituciones relacionados con los distintos aspectos de la política y el planeamiento de la Educación.

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FOREWORD

The present document constitutes a summary of the study on "Educational Planning Methodology for the Integrated Development of Rural Areas" carried out by the Unesco Regional Office for Education in Latin America and the Caribbean (OREALC).

The low levels of development in rural areas in Latin America are often attributed to excessive centralization. The making of decisions is in general concentrated in the capital cities, only a minimum margin of initiative being left to regional and local bodies. The former consequently absorb a major share of the expenditure allocated to economic and social development programmes. At the same time the resources assigned to education, the information media, and cultural events also tend to become concentrated in the urban areas.

The growing pressures being exerted from the rural areas have however encouraged governments to search for new forms and new instruments and methodologies for inter-sectoral and educational planning, to give due consideration to this question. For its part, the Unesco General Conference, particularly at its last two meetings (Nairobi in 1976 and Paris in 1978) has assigned a high degree of priority in its budgets to education for integrated development in rural areas.

In its awareness of these concerns, the Unesco Regional Office for Education in Latin America and the Caribbean has in recent years promoted and organized studies, courses, workshops and seminars on this subject in collaboration with several of the countries of the region. The document consists of a summary, reviewed in the light of experience and the results of the Brasilia Workshop (*), of some methodological guidelines tested in the Province of Catamarca (Argentina), in the Department of Sololá (Guatemala), in the Seridó micro-region (State of Rio Grande do Norte, Brazil), in the micro-region of the rural southern zone (State of Pernambuco, Brazil), in the area of the Río Babahoyo Irrigation Project (Province of Los Ríos, Ecuador), in the Department of Tarija (Bolivia) and in the La Quebrada zone (Province of Jujuy, Argentina) during the practical work carried out on the occasion of the mentioned activities, concerning a planning methodology for the integrated development of rural areas.

The document is not the consequence of a full investigation but rather the fruit of experience gained in various countries, collected in the form of opinions and proposals. If it is intended to design

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(*) "Taller Regional sobre Metodología del Planeamiento de la Educación para el Desarrollo Integrado de Areas Rurales". (Regional Workshop on Educational Planning Methodology for the Integrated Development of Rural Areas); Brasilia, 6 to 10 November 1978, Informe Final, (Final Report), Santiago/Brasilia, OREALC/MEC/SG, 1978.

educational policy in accordance with the specific social, economic and educational characteristics of the various rural areas, it will not suffice to adopt decisions in this respect at a political level. It will additionally be necessary to bring about a greater concentration of effort and a greater exchange of experience at a technical level among the planners and investigators engaged in these matters.

But the adoption of a planning methodology for rural education calls for a new attitude on the part of those participating in the task. Local work within the context of national development and planning, the establishment of priority objectives at a micro-regional level without losing sight of the national social and economic conditions as a whole, and the setting up of inter-sectoral teams are some of the aspects of this new attitude which can only be achieved through study, experience and imaginative effort.

The importance attributed to the participation of the community in the process of educational planning for integrated rural development stems from a conviction that such integrated development cannot be envisaged other than on the ground of the needs, problems and aspirations of the people living in such areas. It is in fact the scant consideration which has in general been given at a political level to the expectations of rural communities which constitutes the main reason for their state of relative backwardness. The establishment of a new economic order will not be possible so long as significant sectors of the population remain excluded from the centres of authority and decision.

INTRODUCTION

Integrated rural development is seen as a social, economic, political and cultural process in rural areas, designed to improve living conditions. The process develops through the conscious and critical participation of the rural people in an examination of their problems, needs and interests : in the formulation of solutions, and in the decisions and activities undertaken to transform their circumstances and overcome their community problems within the global context of society. Under this concept, integrated rural development implies, among other features :

i. the preservation and creation of social and cultural values ;

ii. the modification of structures which contribute to the marginality of rural communities ;

iii. the mobilization and organization of the members of the community ;

iv. the utilization of the community's own resources, and

v. concerted action by the various institutional sectors operating in the area.

This concept of rural development aims to emphasize the role of the community itself, without disregard of the importance of external stimuli. In order to implement this concept of development the need for co-ordinated action by the various sectors involved is evident, including that of the education sector since, as a factor in development, education proves operative only when forming part of a more general transformation process. Education should therefore be directed towards cooperation in the solution of the problem and of the concrete economic, social and cultural needs of the rural communities.

Within this approach it is the rural communities themselves which, through participation in the process, should establish their needs and define their priority interests, the main role of the planner being to motivate such participation and help the rural community to realize its needs and search for solutions.

Some questions nevertheless arise in this respect, namely :

- Is it possible to reconcile the aspirations of the rural people with the overall directives of national policy ?

- How bring about true complementation among the various institutional sectors acting in a rural area ?

- How incorporate community representatives into the process of decision-making concerning the rural area ?

- How undertake a diagnosis of the problems that hinder development at the rural area level ?

-What is the role of the education sector in integrated rural development?

-How overcome resistance encountered at the rural community level to the introduction of a participatory, inter-sectoral and decentralized educational planning process?

-What should be the role of national planning in the concept of education for integrated rural development?

The present document deals in the first place with education and the social and economic context in the rural areas of Latin America and includes in this connexion some general considerations on the present educational position in those areas, as well as the main characteristics of the areas themselves and the prevailing trends and approaches in the countries of the region.

On the other hand, knowledge of the differences between various rural areas constitutes a reference framework which will facilitate a closer understanding of the situation prevailing in a given area. While it is difficult to point out the most significant indicators which should be considered in a characterization of the various situations, mention should be made of those which refer to population and flows, anthropological and cultural aspects, the ecology, the structure of property, employment and income, the marketing and credit system, social organization, power structure, communications and levels of welfare (education, health and housing). The various rural situations may vary between total stagnation at the one extreme and conditions involving a high degree of agro-industrial development at the other. The need to define these varying conditions lies in the fact that different rural circumstances will call for correspondingly differentiated treatment, with the use of mechanisms and activities appropriate to each situation. Clearly, the lines of action in the field of education will have to vary according to the requirements emerging in each concrete circumstance. The present summary deals in fact, in the second place, with the characterization of rural areas, including in this respect some considerations regarding the main existing categories.

Thirdly, in dealing with the planning of education for integrated rural development, the present document describes the principal aspects of this process in general terms and puts forward some conceptual and methodological ideas in this connexion in an endeavour to provide answers to the aforementioned questions.

In the fourth place, the conditions and characteristics of the process of educational planning for integrated rural development are examined. The most relevant of these features is undoubtedly the participation of the rural communities themselves in the planning process. It cannot be denied that the objectives, structures, contents and resources for rural education are in most instances established on the basis of circumstances differing from those in the rural areas, with the result that education may actually be contributing to an aggravation of the disadvantagement of rural communities.

In many cases planning at the national level does not contribute to a proper interpretation of the expectations and needs of the agricultural communities; it is nevertheless of vital importance to know what such

communities think and want in connexion with their own education. The concept of participation lends itself to a variety of interpretations. In its application to total conditions, what is desired is that the rural community should reach a point of effective intervention in the decision-making process.

In a broad sense, participation implies decentralization of the administrative set-up and a parallel assumption of responsibility by rural communities in the implementation of programmes. Participation must be promoted, and thus involves a corresponding educational process. Optional modes of participation depend upon situations of a general nature. Such options must therefore be defined on the basis of each specific situation.

Participation processes in rural areas may range from simple enquiries to autonomous self-management. The approach to be adopted will depend upon the prevailing circumstances and on the objectives fixed for such participation. Consequently, a methodology for participation by the rural communities in educational planning for integrated rural development may only be devised on a basis of actual situations.

Interesting experiences of participation by rural communities in the educational process have been taking place in recent years in some of the Latin American countries (Perú, Ecuador, Panamá, Honduras). Based on these experiences and on the concepts already expressed, the present document includes some thoughts on the following topics:

-Who should participate and in what manner

-What should be the degree of participation in the adoption of decisions on basic educational aspects

-How encourage the establishment and stimulation of study and action groups within the rural community in terms of interests or educational activities

-How arouse interest among groups or associations already existing in the rural areas regarding processes of joint action and participation

-Methods to promote participation by the community in educational planning for integrated rural development.

Fifthly, the present document refers briefly to the educational planning process for integrated rural development and its principal components. In this respect attention is drawn to the importance of identifying the most significant aspects of the situation in a given area through examination of the following fields.

-The social welfare, economic and cultural situation of the population in the area

-Population dynamics

-Performance of the political and administrative institutional organization

-Social and cultural circumstances

-Environmental conditions

-Communications systems

-Educational performance in the area and evaluation of its contribution to development

The next recommended step is to proceed with a diagnosis of integration and participation consisting of a summarizing process, the main purpose of which is to gain an overall view, as accurate as possible, of the existing situation. In a word, the purpose is to identify, jointly with the community, those factors favourable to development and the principal problems or anomalies confronting the rural area that constitute factors impeding its development.

From the situation so detected, the planning process would proceed to the stage of programming. This would commence with the fixing of objectives and designing of an educational structure consistent with the aspirations of the people of the area.

In drawing up the objectives and structure it is advisable to take into account any limitations arising from the actual prevailing circumstances, the conditioning features deriving from the political framework and the hopes of change expressed by the community itself.

A review of global and sectoral development plans will enable the broad guidelines of change at the political level to be deduced, and the periods of time and strategies necessary for its development. Thus, where it is seen that there is a considerable degree of interest in the integrated development of the rural area, education will enjoy greater possibilities of effectively supporting that development; whereas if only disconnected activities promoted by one institutional sector exist, the possibilities of contribution by the education sector to integrated development will be correspondingly reduced.

It is advisable that the methodology should take into account mechanisms for the adaptation of objectives in the event that contradictions were to arise between political definitions and the aspirations of the community. In any case, the objectives of the education sector should be specified in the context of the objectives for integrated development in general.

The formulation of an educational structure appropriate to the needs of the area should be based on the expectations of change revealed in consultation with the community.

The task of programming commences after the basic orientation of future action has been determined and the hypothesis of structural change considered most advisable and viable has been defined.

Through the programming of education for rural areas it is sought to achieve a qualitative and quantitative expansion of educational activity, ensuring a high degree of efficiency in the use of resources. The aim is to select a combination of variables which will ensure the granting of more education, better suited to the needs of the area concerned.

Programming consists basically in establishing operating objectives for each element of the system and defining the activities which should be carried out to fulfil those objectives with the resources available, with simultaneous indication of the timing, sequence and location of those activities.

The possibility of fulfilling the objectives in the periods planned is linked with the availability of resources. A programming methodology should consequently also include specification of any unconventional resources as well as the appropriate utilization of resources already at hand.

Programming will detail the following:

a. The options for giving attention to the community to be served that will enable fulfilment of the established objectives, and their distribution in terms of time and space.

b. Definition of the contents and of appropriate strategies for their implementation based on the characteristics of the target population, of the specific objectives and training schedules drawn up in respect of each population sector; the requirements of training and recruitment of human resources -teachers and others- consistent with the expansion and programme contents envisaged, and the technological requirements and their related criteria and forms of utilization.

c. The characteristics of the physical infrastructure, equipment and forms of operation and specification of the requirements of fixed plant and equipment consistent with the expansion envisaged.

d. The annual requirement of investment and operating resources, and the financial flow from various sources.

e. Formulation of an institutional model capable of implementing not only the structural changes proposed but also those envisaged in terms of population to be served, contents and methods, use of technologies, etc.

The stage of devising strategies for the introduction of an educational plan for rural areas consists basically in identifying those decisions that will of necessity have to be adopted to overcome the main obstacles which may be encountered by the plan and which, at the same time may be politically viable and timely. In other words, in order to formulate an appropriate strategy it will be necessary, based on consideration of the principal factors favouring or hindering the fulfilment of the programmed activities, to identify those key decisions and basic guidelines for action which in the light of prevailing circumstances may ensure the success of the plan.

In the sixth and final place the present summary refers to the elements involved in formulating a strategy aimed to ensure the appropriate role of education in integrated rural development, strategy being understood as the art of directing activities or combinations thereof as necessary to promote or implement the achievement of certain objectives and targets. Some basic considerations are put forward in this respect, together with a method leading up to the formulation of a strategy which will take into account the political as well as the technical and administrative dimensions and will moreover be based on the particular characteristics of the rural area.

These, in brief, are the subjects dealt with in the present document.

1. EDUCATION AND THE SOCIO-ECONOMIC CONTEXT IN THE RURAL AREAS OF LATIN AMERICA AND THE CARIBBEAN

1.1 The present Situation

The state of education in the rural areas stems from a combination of historical situations which have given rise to its present specific characteristics, which constitute a reflection of the social, economic and political circumstances influencing the processes of change within the social system.

The endeavours made towards economic and social planning and educational reforms have shown fundamental concern for the development of rural areas 1/ "The growing disparity between the incomes of different countries (developed and developing) resulting from the conditions in which material goods are produced and the present system of international trade, is parallel within each nation by inequality of distribution among the various social categories and frequently, too, by a discrepancy between town and country" 2/.

Despite the existing limitations in the acquisition of an appropriate degreee of knowledge of the characteristics and problems arising in the rural areas of the Latin American and Caribbean countries, studies carried out in several countries of the region, as well as information contained in their development plans and programmes and in the reports drawn up by various international agencies, make it possible in a first over-all approximation, to determine the basic characteristics and trends in those areas in terms of the structure of land tenure, the means and relationships of production, marketing, social organization, availibility of basic services, and dependency on the more developed urban centres.

Agricultural activity predominates throughout the region, though the existence of mining and industrial activities in certain rural areas should be borne in mind: an analysis of these particular situations may merit individual treatment.

Among the main characteristics influencing the situation in the rural areas mention should be made of their disadvantagement and dependency, the more extreme cases of "latifundio" and "minifundio" (excessively large and small landholdings), centralization and lack of participation and, in particular, the scant development and low efficiency of education.

1/ Meeting on the Implementation of the Recommendations of the Venezuela Conference of Ministers of Education, Panamá 9 to 14 February 1976. Final Report, Santiago, Chile, Unesco Regional Office for Education in Latin America and the Caribbean.

2/ Unesco. Moving Towards Change: Some Thoughts on the New International Economic Order, Paris, 1976.

It is a fact that the rural areas in Latin America and the Caribbean are in general characterized by their disadvantagement and dependency in relation to the urban areas, the latter having attracted the larger investments and thus achieved higher levels of growth, a circumstance which has given rise to considerable inequalities in the distribution of goods and services. The rural population thus finds itself increasingly compelled to emigrate from its natural surroundings to the industrial centres in the hope of finding better living conditions. This migratory trend is not of course equally intense in all countries, nor in different parts of the same country.

Various factors contribute to this situation of disadvantagement and dependency, among which the inadequate structure of land tenure, shortage of credit, limitations in the appropriate use of technology, a deficient marketing structure and the low educational levels of the people are particularly responsible.

Most of the available indicators confirm the fact that the rural communities in Latin America and the Caribbean live in conditions of poverty whose material consequences are a deficient state of health and nutrition, a low level of culture and education and a lack of social integration. 1/ While there are differences - in some cases very marked - between countries and within the countries themselves, it may in general be said that living conditions in the rural areas are considerably inferior to those in the urban centres, and the range of variability between the rural areas themselves is relatively small.

Most of the rural populations lack opportunities for permanent employment and, from the point of view of the predominating common economic concept, show high rates of unemployment together with low levels of productivity. 2/

The absence of horizontal coordination among various sectors and their relative lack of vitality combined with a tenuous division of responsibility between them, adversely affect development in the rural areas and consequently accentuate their dependency on the urban areas where each sector displays a greater definition of objectives and programmes and decidedly more individual drive.

The excessively large and small landholdings have developed as specific forms in a process of polarization in the structure of property; but at the same time other forms of property have arisen in this process of change in Latin America and the Caribbean such as cooperatives, farming partnerships and

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1/ Seminario de la pobreza crítica (Seminar on Critical Poverty), Santiago, CEPAL/ILPES, 1977.

2/ Consideraciones sobre el empleo y sus relaciones con la educación y la capacitación en los medios rurales (Some thoughts on Employment and its Relationship with Education and Training in Rural Areas). Santiago, Unesco Regional Office for Education in Latin America and the Caribbean, 1976. 62 p. (Serie Brasil/CNDR1/5).

companies, and those deriving from agrarian reform. These forms of tenure give rise to different educational requirements and the demands and needs of the rural workers and small landowners are thus the most difficult to define in terms of an educational response. 1/

To the foregoing restrictive conditions is added a lack of participation by the rural population as regards decisions of an economic nature and also those of a social and political character. Of obvious influence in this situation are: an absence of community organization, the dispersal of the rural inhabitants and scarce means of communication, as well as the fact that, as already mentioned, the development policies defined for rural areas are based in a great many cases on the capital city and on criteria of an urban character. At the same time, the centralization of planning activities and lack of co-ordination among sectoral programmes hinder the possibility of taking due advantage of the productive capacity of the rural communities and an integration of the various sectoral activities at the local level.

On the other hand, the centralization predominating in the educational sector also obstructs its integration with rural development and its adaptation to the actual needs of the country people. Educational activities are often conducted in an unco-ordinated manner, the institutions operating in the curricular and extra-curricular fields in rural areas acting independently one from another. 2/ Similarly, the curricular contents are in most cases based on situations alien to the rural areas and without sufficient discussion, a situation giving rise to curricula tending to a universality of results-academic, excessively lengthy and leaving little or no margin for adaptation to local conditions. All of this is aggravated by a lack of sufficient teacher training and frequently by insufficient resources. This methodological situation based on disconnected study subjects, encourages the fragmentation of instruction. In this sense, education is contributing to aggravate the condition of social and cultural disadvantagement of the rural communities and the discrepancies between their educational needs and the services actually provided.

As regards the educational level of the rural population, a study concerning 8 countries (representing 63% of the Latin American population), using information from censuses taken in 1970, revealed that more than 50% of the population of 15

1/ On the occasion of the Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas held in Guatemala from 18 August to 10 October 1975, a document was published entitled Acerca de las estrategias diferenciadas (Concerning Differentiated Strategies) in which this subject is dealt with in some detail.

2/ Meeting on the Implementation of the Recommendations of the Venezuela Conference of Ministers of Education. op. cit.

and more years of age reached the third primary grade as a maximum; and as regards higher education less than 0.5% of the rural population had been able to reach this level.

The censuses taken at the beginning of 1970 in 13 countries showed that illiteracy rates in five of them remain above 30%. In absolute terms, the illiterate population in Latin America and the Caribbean in 1970 would number approximately 44.4 million, of whom some 35 million lived in rural areas. It should be pointed out that the illiteracy rates have been falling noticeably in the present decade, thanks to programmes promoted in some of the countries. 1/

Enrolment in the medium and higher levels of agricultural instruction showed a slight increase during the 1960's. In the year 1960 enrolment in the medium level of agricultural education represented 2% of the technical instruction at the level, whereas this percentage grew to 2.8% in 1970; in absolute terms the number of students is estimated to have increased in the period mentioned from 48,000 to 67,000. As regards higher education the proportion of agricultural subjects has been rising; enrolment in 1960 represented 3.8% of the total in higher education,. and reached 4.1% in 1970. In absolute terms it rose from 16,900 to 63.100. For the year 1975, in the event of continuation of the rising trend observed in the second half of the 1960s, the number of students enrolled in agricultural studies at the higher level may be estimated to have reached 145,000.

The total teaching staff in primary education in the rural areas of Latin America and the Caribbean doubled in number in the period 1960-1975, increasing from 290,000 in 1960 to 651,600 in 1975. However, for each primary school teacher in rural areas in 1960 there were 1.6 such teachers in the urban areas; and this relationship increased to 2.1 in 1970. Furthermore, considering the total complement of teachers at all levels of the educational system, the primary education teachers in rural areas in 1960 are seen to have represented 23.3% of the total number of teachers in Latin America and the Caribbean. This figure fell to 18.8% in 1970. 1/

In this case of stagnated rural areas, institutionalized education has proved to be of little efect. It may be said to have been unable to promote greater vitality in production processes through agricultural training. In other words, education in this instance would not be responding to the true agricultural situation in the sense of promoting effective channels for integrated rural development.

Some experiences incorporating a certain degree of innovation have endeavoured to stimulate the role of education in these areas, but their number and size, as well as their isolated character have in general impeded their effective contribution to the processes of change.

1/ For further details, see the source of this information, namely Educación para el desarrollo integrado de las zonas rurales de America Latina y el Caribe (Education for the Integrated Development of Rural Areas in Latin America and the Caribbean), Santiago, OREU, 1976,(Serie Brasil /CNDRI/2).

2/ See: Educación para el desarrollo integrado de las zonas rurales de América Latina y el Caribe.(Education for Integrated Development in the Rural Areas Of Latin America and the Caribbean) Santiago, OREU, 1976 (Serie Brasil/CNDRI/2).

Particular attention should be drawn to certain initiatives introduced in some countries in the administration and programming of educational services, such as school consolidation and rural development concentrations, the aim of which is a greater rationalization of available resources and, in general, a closer adaptation to the needs of the rural areas, 1/

Other factors similarly contributing to the low level of educational efficiency and productivity in rural areas are the poverty of families, the use of child labour, infant malnutrition, the health, social and cultural situations, the high morbidity and mortality levels, deficient housing and environmental sanitary conditions, illiteracy of the students' parents and relatives, the differences of idiom between families and schools and the differing values of the family, the area and the educational establishments. In spite of this situation, school education has not acquired appropriate forms of adaptation to the conditions and needs of the poorer classes in the rural areas with the result that large sectors of the population either do not attend school or leave early. In many instances the school does not promote community activities or use the existing infrastructure, and fails to associate its programmes with the community or with its various basic representative groups such as, for example, the cooperatives, trade unions and the parent associations. In short, it fails to fulfil the outstanding role expected from it by the rural communities.

To all the foregoing must be added the limitations of language employed in the educational process, the inadequacy of school calendars, deficient programming of school activities, low qualifications of the teaching staff and absence of mechanisms to facilitate a better use of their capabilities.

Under the aforementioned conditions efforts to achieve a substantial change in the living conditions of the rural populations are thwarted. It would appear that the considerable human and financial resources devoted by public and private bodies to raise the welfare levels of country people become so diluted that their effects hardly reach them, or do not at all. Where instruments of control reach the point of implementation, it is at the expense of the fulfilment of the programmes and of their adaptation to the environment in which they are carried out.

1.2 New Approaches and Trends

The situation already described and the results deriving from sectoral programming for rural areas, have induced the authorities in some Latin American and Caribbean countries, as well as national and international bodies concerned with development, to review the treatment hitherto given to planning, and has led them to consider a change of policy, directing activity towards a more equitable distribution of social welfare throughout all communities.

1/ See: Sibylle Riedmiller, Experiencias significativas de la educación en el medio rural de América Latina, (Significant Educational Experiences in the Rural Areas of Latin America). Guatemala, Project RLA/70/507 UNDP-Unesco, 1975 (Serie (CPER/Inf/8) - Provisional document.

In general terms it may be said that the changes envisaged, and in some cases already instituted, are designed to give support to a movement of decentralization, assigning greater technical and administrative responsibilities to those directly entrusted with the provision of services. At the same time, the rigidities with which national programmes have hitherto been drawn up are eased with a view to opening the way to greater consistency and co-relation with regional and local programmes. Moreover, the establishment of development programmes designed for particular regions or areas is becoming an increasingly frequent occurrence, such programmes taking into account - though in most instances only partially - the principle of inter-sectoriality. In terms of the rural communities playing an active part in their own development, a growing number of pilot experiences is in progress in various countries, through which it is aimed to gain greater control over the political mechanisms and directives which mostly influence the achievement of such participation.

From the foregoing it may be deduced that in certain instances favourable conditions exist for the drawing up of specific policies for rural areas as well as for the introduction of planning processes designed to bring about integrated development in such areas in a manner consistent with their particular characteristics.

Within the aforementioned trend special mention should be made of some new lines of educational activity in rural areas which are based on fresh objectives and changes in the structure and operating methods of education.

Insofar as educational objectives for rural areas are concerned, their definition in accordance with the prospects and particular circumstances of the various rural areas in each country is already being encouraged, in the understanding that education should prepare the rural population for effective co-operation in the integrated development of those areas. This without detriment to fostering in the student basic concepts of close concern to him as a member of society, such as, for example, the right to a minimum welfare level, and the right of work and of participation.

Basic education for rural areas should encourage members of the community to feel responsible for their own development, foster attitudes for the useful employment of the resources available in the area, stimulate learning and provide the basic scientific and technical concepts to bring about a substantial improvement in the productive process. This minimum basic education would be a priority nature, and the efforts towards educational development should consequently, in the first place, aim to ensure that it be extended to the entire population under 15 years of age before contemplating any raising of minimum aims for the benefit of certain sectors.

Similarly, education in rural areas should include, for those of 15 or more years of age, out of school forms of basic and working instruction with emphasis on aspects such as health, nutrition, housing, culture, work, agricultrual technology and others of similar primary effect in an improvement in living conditions. This education should encourage an understanding of conditions prevailing in the area concerned and of solutions to its problems, inducing in the students an ability to interpret their world objectively. It should also train them to make better use

of available resources and to take full advantage of the benefits derived from them. On the other hand, this out-of-school education would promote the organizational capacity of rural communities in respect of aspect of aspects of common interest and, more specifically, in respect of a better distribution of opportunities of various kinds among all their members.

Among the main educational concerns in rural areas is the need to impart, in generalized form, instruction in basic aspects related to health, nutrition and integral child development.

Finally, education for rural areas of whatever kind, is understood to form part of the plans for national, regional and local development in joint action with other sectors engaged in the promotion of development, in such a manner as to ensure that special attention is given to the communities (men and women of all ages) in the aspects in which they are most deficient and secure the participation of the whole community in the process.

As regards the new orientations relating to structure and contents, it is necessary to view the new integrated educational structure, comprising school and out-of-school methods adapted to the living conditions of the community and giving attention to its basic needs, as a firmly established educational concept.

A new method of teacher training should also be promoted in order that teachers may be in a position to understand the significance of integrated rural development and participate in it actively, encouraging and inspiring community initiatives.

From the point of view of operating methods, the basic concerns currently observed are those relating to the achievement of effective co-ordination among all educational activities carried out both in and out of school in the rural area involved (regardless of any existing institutional autonomies), to the maximum utilization of all human resources and of all social communications and physical insfrastructural facilities available in the area, as well as the conscious and effective participation of the community itself.

The trends and new orientations are similarly seen to be consistent with the particular characteristics of the various Latin American and Caribbean rural areas. For example, in the subsistence-level areas there is a need, from the educational point of view for a basic, integrated and permanent form of education, conceived as a community responsibility and not merely as a scholastic activity for a given age group. Use of the social communications media, and the system of school consolidation enable the communities to be organized for autonomous development directed to the improvement of their living standards. Education, when conceived as a contributory element in development, becomes tantamount to education of the community for the community, since development should be planned in relation to man and not the reverse.

In regard to areas in a stage of development, the essential role of education should be to hasten the process of transformation. Its effect in terms of economic expansion in general and growth of income in particular would be greater than in areas at the subsistence level.

In certain circumstances it will be appropriate that education pay greater attention to aspects related to social organization and participation; in others it may be more suitable to educate with a view to improving the terms of production, the marketing of products and utilization of family earnings. It is also possible in areas of this kind to plan a significant improvement in educational services relying on the contribution of the students themselves.

In any case, whatever may be the diferent situations found in the Latin American and Caribbean rural areas, a set of options will always be available, with different weightings and objectives towards growth and inevitably with different possibilities for social and cultural development. Under such circumstances, constant community participation and a wide degree of autonomy at the local level will be important features for the full success of the educational programme.

Furthermore, the need should be emphasized for promoting innovative educational processes which, within the particular social and cultural background, are rooted in the actual needs and potentialities of the communities concerned and in the economic and social objectives to be achieved in accordance with national development.

2. THE CHARACTERIZATION OF RURAL AREAS

Knowledge of the differences among the various rural areas will be a useful reference framework for a better understanding of the situation prevailing in the area to be planned. The process of characterization of the different situations in the rural areas of a country or region seeks in effect to identify those differences.

The characterization of rural areas is intrinsically associated with a process of diagnosis of extensive zones, and consequently relates to a variety of area types; hence it is difficult to lay down guidelines without running the risk of incurring in generalities.

From this point of view, in attempting a process of characterization it will be advisable to consider any related studies which may already have been made by reliable entities. The fields of operation of different agencies are not identical; therefore the classifications made from their different points of view and criteria may, after due reconciliation, assist in determining the institutional support and co-ordination of services. Such studies in practice provide a wealth of information and of classifications on which to establish indicators for the characterization of rural areas.

For educational planning purposes, one of the principal aims of characterization at the over-all level would be to define some basic considerations to enable educational planners to identify different areas and communities with a view to establishing their boundaries and the priorities for educational activity in the rural areas of each zone or country. This characterization process will moreover open the way to a better knowledge, wider viewpoint and greater relevancy of educational activity.

The problem of characterization of differentiated areas for educational purposes would not exist in the event that development planning had produced a typology and definition of homogeneous areas. This not being the case, educational planning could deal with the problem on the basis of certain criteria: namely that the basic terms for characterization be established in accordance with information and suggestions provided by the various institutional sectors concerned and that characterization be the result of inter-sectoral consultation.

Every typology tends to simplify the real situation, sometimes to a dangerous extent. Efforts should therefore be made to ensure that characterization is made through the use of instruments facilitating an ever closer approximation to the true situation and effective options to deal with it.

In making use of such characterization instruments account should be taken of the fact that at the root of every rural situation lies a determinative force which, while accounting for it, may be changing its nature to a greater or lesser degree. It is thus important to ensure an understanding of the historical, cultural, colonization and land-exploitation processes generated by each situation.

2.1 Main Elements to be Considered in Characterization at the Over-all Level

The complexity of rural areas does not make it easy to decide on the indicators to be considered in the characterization of the different situations arising in such areas at the individual, family group, or community levels. It is nevertheless, advisable to establish in the short term the existing similarities between divisions, zonings or regions of a country for a better definition of the educational activity to be carried out in the different areas. This task will have to be repeated in respect of each region or country on the basis of appropriate criteria for each actual situation and of an over-all approach employing different indicators. The principal aspects constituting rural reality and which may consequently assist the planner in the selection of characterization indicators are those relating to:

-The ecology
-Population composition and dynamics
-Human settlements
-The structure of property
-Work and income
-Production, marketing and credit systems
-Social organization
-The structure of exercise of power
-Communications
-The levels of welfare (education, health, housing)

For the purpose of identifying the indicators corresponding to each aspect, it is suggested that consideration be given to the use of a table such as that shown hereunder, adapting and supplementing it in accordance with each actual situation.

The characterization of an area will not however be exhaustive through the mere numerical application of individual indicators for each aspect. It is the combination of them that will enable discovery in each case of the real situation in regard to human inter-relationships (family group, methods of work, access to the instruments and benefits of work, formal organizations, social forms) and the man-land relationship.

Bearing in mind that each of the aspects making up rural reality involves organizational, functional and spatial elements, a further option for the above analysis might be to assemble the information in the form of indicators for structure, function and spatial location. The structural indicators would comprise the combination of instruments of measurement enabling interpretation of the economic and social, and juridical and political structures; in the second instance, instruments of measurements would be available on the power structure and functions of the various elements; and, finally, in the third instance those instruments of measurement would be included which would enable determination of the spatial location, in defined territories, of the relationships existing between the various structural components, within specific organizational forms.

TABLE Nº1

MAIN AREAS AND ASPECTS COMPRISING RURAL REALITY

AREAS AND FORMS OF PRODUCTION / ASPECTS TO BE CONSIDERED 1/		Anthropological/ cultural			Population and flow of same			Ecology			Property Structure			Work & Income				Marketing & Credit system			Social organization			Exercise of power			Communications			Welfare levels			
		Ethnic groups	Cultural manifestations and linguistic communication	Handicrafts	Structure and size	Spatial distribution	Migratory trends	Climatic conditions	Topography	Natural resources	Land tenure	Terms of production	Productivity levels	Production techniques	Organization of production	Social division of work	Income distribution	Degree of unemployment and under-employment	Forms of marketing	Marketing level	Credit distribution	Social categories	Degree of social organiz.	Types of social organization	Taking of decisions	Power groups	Pressure groups	Road infrastructure	Radio and T.V.	Press	Average educational level	Health and nutrition	Housing	Infrastructure
TRADITIONAL AREAS	1. Large estates																•			•													
	2. Large/small landholding complex (lati/minifundio)																•																
	3. Native settlements																																
AREAS IN PROCESS OF MODERNIZATION	1. Agricultural commercial enterprises																																
	2. Agrarian Reform																																

1/ The most relevant indicators should be shown for each of these aspects.

2.2 Aspects Involved in the Characterization of Rural Areas

The various realities in rural areas may range from situations of total stagnation and even of retrogradation, to situations involving a high level of agro-industrial development. Moreover, some situations may prove complicated; due to the fact, for instance, that in a given area evolutional developments may be identified alongside pockets of immobility.

Even taking into account the diversity and complexity of situations, the possibility should be mentioned, in an indicative manner, of dividing the areas into two broad categories in a first approximation to the study of differentiated atrategies: namely the depressed areas on the one hand and the areas which may be classified as modernized or in process of modernization on the other 1/.

2.2.1 The Depressed Areas

The major proportion of the rural population in the region is living in economically and socially depressed areas where traditional productive forms subsist, namely: the large estate ("hacienda"), the large/small landholdings complex, and native settlements. Since these forms of production are the cause of the poor living conditions, close to critical poverty, of the majority of the people, each is briefly described hereunder:

a. The large estate ("hacienda") represents exploitation of an extensive landholding and is a form which predominated until a few years ago. It still exists as a productive method in several countries of the region and lies at the root of the present agrarian structure.

The owner of the large estate reserves part of the land surface for his own farming operations and distributes the rest, in lots, to peasant families who pay for their use by providing him with labour.

The large estate constitutes an autonomous social unit having contact with the outside world solely through the owner. The power of the latter is almost absolute; he exercises a decisive position in the social organization of the peasantry who, together with their families, are compelled to provide him with the most varied services.

The inability of the large estate to adapt to new economical and social circumstances has brought about its gradual replacement by other forms of production.

1/ It is understood that many possible characterizations may exist depending upon the sociological approach adopted, the rural development processes or the changing situation in the area. Reference in this respect may be made to "Taller Regional sobre Metodología del Planeamiento de la Educación para el Desarrollo Integrado de Areas Rurales (The Regional Workshop on Educational Planning Methodology for the Integrated Development of Rural Areas) (Brasilia, 6-10 November 1978). Informe final (Final Report), OREALC, Santiago, 1978.

In regard to this theme reference may be made to Selim Mohor's work on "Formas de Producción Agrícola e Intervenciones Educativas en América Latina y el Caribe", in Informes de Participantes sobre Planeamiento y Administración de la Educación para el Medio Rural en América Latina y el Caribe. OREALC, TRMPEAR/3, Santiago, 1978.

b. The large/small landholding complex is a situation characterized by the co-existence of large properties with very small ones barely able to supply the subsistence needs of a family. This situation is notable for a predominant under-utilization of resources and a low level of investment, productivity consequently being minimal.

The large landholding ("latifundio") derives mainly from the large estate ("hacienda"), partially through a process of re-possession of lots assigned to the peasant families, and partially through the rental or sale of small lots which thus give rise to the small landowner who, in turn, undertakes paid work for the large landowner. The latter generally resides in the capital city and shows little interest in the intensification or diversification of agricultural or livestock development since this would complicate his administrative arrangements. Mechanization is limited, and outdated production techniques are used. The social division of work is incipient and of practically no significance. Two very marked social categories exist, namely the landlord boss ("patrón") and the peasant worker ("peón") who is generally also a small landowner. The terms of production are of a traditional kind between boss and worker. Many services are paid for in kind or through permitting the use of land. Under-employment and temporary unemployment levels are high, and total unemployment is also to be found. The average income level is low and its distribution very inequitable. Though the large landowner continues to dominate the local scene, the absolute dependence on him of the peasant family which is a predominating feature of the large estates, is beginning to diminish.

The small landowner, who almost always forms part of a social and economic unit in conjunction with the large owner, stems not only from the sub-division of large estates but also from the disappearance of native settlements. His property is of very small dimensions and production is at a subsistence level, being barely sufficient to satisfy the needs of his family. The small holding is worked by members of the owner's family on an unpaid basis and without the application of any technology. The land owned by the small farm operator is generally that of lowest productivity since, where it is of some economical value it is in the interest of the large landowner to incorporate it into his own property. This has been one of the factors contributing to concentration in the ownership of rural property. The small operator, having no investment or credit-raising capacity and devoid of appropriate production techniques finds himself trapped in a vicious circle of poverty. Almost constantly under-employed, he must always be on the look-out for any work opportunity that may arise in order to survive. In this manner he is always available to the large owner for temporary, low-cost labour; if not so employed he finds himself compelled to emigrate.

c. The native settlements, in their turn, constitute traditional groups of an associative character, composed of nuclei of indian populations living at a low subsistence level. While, from a point of view of agricultural production, their circumstances are similar to those of the small landowner, they have a characteristic common origin, especially on a cultural plane. Most of these population groups have been displaced from the lands on which they originally settled and have moved to less fertile zones which, moreover, have been progressively sub-divided to the point of becoming increasingly critical small landholdings. In these cases the value of land is related more to its use than as property, and hereditary family occupation of the surfaces under cultivation is the rule.

Because of the production methods used, the ostensible level of unemployment in these communities is low. On the other hand, the average income level in monetary terms is extremely low. The situation as regards health and nutrition is precarious, malnutrition and lack of medical aid being typical circumstances. Means of external communication, including the road infrastructure, are inadequate.

2.2.2 The Modernized Areas and those in Process of Modernization

A further sizable category consists of those areas where modern production methods have become established, either in the form of commercial farming enterprises or through land reform, and where the living standards of the population have consequently improved. In regard to each of these forms of production, the following particulars deserve mention:

a. The commercial agricultural enterprise is established in locations where climatic conditions are favourable to agriculture. It possesses land surfaces potentially appropriate for production and irrigation. In general, the commercial farming enterprise is characterized by intensive use of the land, employing paid labour and advanced technologies. Is usually specialized in one type of production. This form of production is frequently financed by foreign capital and managed by foreign personnel.

The population involved generally concentrates in nearby settlements. The living conditions of the workers show some homogeneity which enables them to respond with a certain degree of efficiency.

The enterprise has at its disposal means of communication, electric power, and telephonic and other services, all of which facilitate the marketing of its products.

Working relations, involving owners on the one hand and workers on the other, the latter having only their services to offer, give rise to two main social categories, namely the landowners and the salaried workers. There is a further category composed of agronomists, administrators, managers, foremen, etc.

In the production process the enterprise employs only the strictly indispensable number of stable workers and employs further temporary workers as necessary. The income level of the former is relatively higher than that of the latter, whose wages, in many cases fixed on a performance basis, are generally undependable and sporadic.

Health and nutrition levels are variable and depend primarily on the degree of worker organization and on the wage level negotiated by the workers.

The development of the commercial farming enterprise leads to the formation of the trade union, a form of organization which enables the farm worker to influence to some extent the policies in the rural area. However, certain social problems deriving from this form of production, such as the suppression of jobs as a result of mechanization, are of considerable significance. Thus, due to the instability of employment and as a consequence of technical developments in these enterprises, there is an intense migratory flow from these areas.

b. Agrarian reform is commonly regarded as a process of change of a social, economic and political nature which seeks to modify the farming structure with a view to improving the living conditions of the country people and integrating them into the national community on the basis of modernizing the productive system. The various models of agrarian reform have affected the structure of land tenure in differing ways: in some instances a compulsory or negotiated expropriation of land has been applied; in others, the distribution of land has been made through the use of publicly-owned or unexploited territory.

The forms of exploitation deriving from land reform have also been extremely variable. In most instances collective working units have been set up in the form of co-operatives, with a simultaneous allocation of family plots of varying size. In other cases reform has been applied only to the existing native settlements. Finally, the distribution of individual working plots has also been resorted to. With this latter exception, ownership of the land is held collectively or by the State.

Whatever the method adopted, agrarian reform has ensured steady employment to the country dweller and has facilitated the emergence of social organizations in the form of trade unions, cooperatives, etc.

Agrarian reform has generally been carried out through a redistribution of large landholdings situated in most cases in areas with favourable agricultural conditions. As a result of employing sufficient and varied natural resources it has been possible to increase the volumen of production with comparative ease.

A developed infrastructure is generally available which facilitates access to consumer markets. The population involved, relatively large in numbers, is distributed in a lineal and/or concentrated manner since this allows for better communications among the members, and for organized transportation to places of work.

At the same time, cooperatives supplying production, support, marketing or credit services enable significant increases to be achieved in the levels of productivity and a growing reduction in the number of intermediaries.

Production is mainly for marketing purposes and only secondly for internal consumption.

The production techniques employed are mostly bought in, both for crop raising and in the use of machinery.

With the growing mechanization of farm production, a significant differentiation develops in occupational responsibilities, the manual and administrative tasks becoming clearly divided. Working relations are of a family or collective nature, though salaried workers are also employed.

In their initial stages of establishment, the agrarian reform settlements absorb a considerable proportion of the work force in the area concerned. However, if the process of reform fails to incorporate larger land surfaces, manifest unemployment and migration may again emerge as the population increases.

Income levels are growing at an increasing rate. Income distribution varies according to whether the earner is a salaried worker or member of a cooperative. In the latter case income distribution is generally better balanced.

The levels of health and nutrition, as well as medical aid and sanitation are relatively satisfactory.

2.3 The Characterization Process and Options of Response by the Education Sector 1/

As the various forms of agricultural production give rise -as already mentioned- to different living standards in the rural areas, so also are different educational levels seen to respond to the varying forms of production. In the depressed or stagnated areas, in which small landholdings predominate, the average level of education of the population tends to be decidedly low. On the other hand, in modernized areas, or in those in process of modernization, with forms of production such as the commercial agricultural enterprise or agrarian reform, the educational level of the people is usually much higher. And it is a noteworthy fact that, in a context of social dynamics, agrarian reform has also contributed to the emergence of its own unofficial educational methods and agencies for agricultural extension, technical instruction, motivation and training as such.

In an endeavour to envisage the operating scope of a characterization process for educational planning, possible options of response by the educational sector are dealt with hereunder as examples in respect of the two main area categories already mentioned:

a. In the depressed areas, in which a subsistence-level economy continues to predominate and traditional forms of production are used, it is obvious that the first aim of a development plan should be to improve the living conditions of the population based on the better utilization, improved distribution and more appropriate employment of local resources.

To achieve this, it is essential that the various institutional sectors come together in an integrated manner, giving coordinated attention to the various aspects with particular stress on the cultural elements which in these circumstances are generally decisive determinants for community participation in a move towards change.

1/ See: The Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas (Guatemala, 18 August-10 October, 1975). "Acerca de las estrategias diferenciadas" (Concerning Differentiated Strategies), Guatemala, Project RLA/70/507, UNDP/Unesco, 1975 (Serie CPER/Metodol. N°25).

Three main general objectives may be mentioned with special reference to education in these areas: i) to contribute to the raising of living standards, preparing the people to produce more and better foodstuffs and to improve their conditions of hygiene and nutritional habits in the home; ii) to facilitate a better interpretation and comprehension of the physical and human environment through the development of self-awareness and promotion of more community organization and participation; iii) to uncover potentialities which may exist, both in the creative capabilities of the people and in the physical environment, and give shape to educational activities for the development of those capabilities for the benefit of the rural community as a whole.

Aspects such as educational attention given solely to children and in subjects having no bearing on the real life of the community; the scarce or non-existent link between the school and teaching staff with farmers, young people and housewives; and the construction of buildings using materials and techniques alien to the area, are factors which, among others, have contributed to the development of a distorted and limited conception of the true role of education and its social significance in these areas.

The struggle for subsistence is the most pressing concern in areas of this kin in this connexion the education sector should define with clarity its contribution to the attention of the basic educational needs of the rural communities, beyond the confines of the school itself.

It is in fact inappropriate to restrict the concept of basic education to the children's schools themselves. Basic educational needs exist throughout the population, and consideration should therefore be given to setting up an educational structure capable of providing basic education to children and adults outside as well as within the schools.

Furthermore, in order to ensure an effective correlation of that form of education with the needs of the area and prevailing working conditions, the community itself should undertake direct responsibility in both its organization and development for the benefit of its members.

This communitarian form of education, as a collective task seeking to become part of the life and productive work of the community with a view to raising living standards and to ensure the participation of large rural groups that have hitherto remained excluded, faces the politician with the responsibility of adopting a clear and unequivocal position. "He who is conscious of the importance of health will claim health services. In understanding the relationship of this situation with appropriate nutrition, he will the more earnestly seek the latter for himself and family, strive to gain more from his work, and will unite with others to defend the value of his product or wage level. He will desire change and seek it, and awareness of these expectations may well give rise to social disputes. Is such disputes are to be eluded, change should not be advocated". 1/

1/ Abner Prada "Educación para el desarrollo rural en América Latina" (Education for Rural Development in Latin America). Proyecto DEALC, Unesco/ECLA/UNDP, Buenos Aires, 1978.

b. In the modernized areas, or those in process of modernization the educational situation and requirements are of a different nature, though a great variety of situations may be encountered.

Among the objectives which education may set for itself in all modernized rural zones and those in process of change, mention should be made of the following: to provide the compulsory education generally laid down in all the constitutional laws of Latin America and the Caribbean for all those between 7 and 14 years of age; to ensure that young people and adults who have not had access to that compulsory education receive basic instruction to capacitate them for incorporation into the development process in the short or long term; to prepare intermediary cadres with sufficient knowledge and skills for entry into the productive process; to prepare the necessary technical contingents in the middle and upper levels consistent with the number and training requirements envisaged; and to encourage the grassroots organizations (especially in the labour and cooperative fields) and other groups taking part in economic, social and political affairs contributing to intervention by the area inhabitants in the adoption of those decisions which more closely affect them.

The primary task of education in these areas will be the integral education of the people with a view to their own area development. It is to be foreseen, however, that technological improvements and the introduction of highly mechanized forms of agricultural production may cause a growing displacement of manual labour from these areas towards the cities. Education should foresee these cases, providing preparation for such developments, especially through the system of non-formal education.

3. EDUCATIONAL PLANNING FOR THE INTEGRATED DEVELOPMENT OF RURAL AREAS

This section puts forward some basic concepts which serve as guide in the planning of education for rural areas. Their formulation stems both from an examination of the new trends observed in the field of planning for such areas and from experience gained so far in the utilization of the methodological process suggested in the present document. It is not intended to deal in detail with these concepts since it is considered that new formulae may arise in future from the co-operation of various agencies and from the subsequent application of the methodology.

3.1 The Concept of Region, Regionalization and the Homogeneous Area 1/

Henri Méot 2/ describes the region as a portion of national space "displaying relations of various socio-economic and socio-cultural kinds, with certain characteristics of coherence and a particular identity".

According to Rubén D. Utria 3/ regionalization is simultaneously a methodological and a strategic operation. In this respect it may be regarded as an instrument for the decentralization of resources and efforts connected with national development policy and programmes, facilitating the distribution of those resources and endeavours in accordance with regional needs and aspirations and encouraging decentralization of the decision-making processes for the benefit of the regions. Sufficiently systematized methodologies or criteria concerning regionalization do not exist, due especially to the fact that they are both dependent on the particular concept applied in the development process.

The situation in Latin America and the Caribbean as regards spatial planning is in fact distinctly heterogeneous. In some countries no concrete activity in the field of regional development planning has as yet been undertaken. In others, certain planning agencies have carried out studies on regionalization but these have not been put into effect. There are also countries in which some sectors - generally health, education and agriculture - have operated independently in a regional manner in accordance with their own particular sectoral policies and have thus hindered the process of inter-sectoral regionalization over the course of time.

1/ In Latin America and the Caribbean, the Economic Commission for Latin America (ECLA) and the Latin American Institute for Economic and Social Planning (ILPES) have drawn up a considerable number of documents on the spatial theory of development. The general bibliography should be consulted in this respect.

2/ Méot, Henri "El concepto de región" (The Regional Concept), Santiago, CEPAL/ILPES, 1971.

3/ Utria, Rubén D. "El marco conceptual y los objetivos de la política social a nivel regional" (The Conceptual Framework and Objectives of Social Policy at the Regional Level), Santiago, CEPAL/ILPES, 1971.

From a historical viewpoint, many countries, particularly those with a federal system, have developed political and administrative divisions such as provinces or states which enjoy a certain degree of autonomy in regard to development planning and have proceeded to set up mechanisms to this end, but have not given attention to inter-provincial or inter-state aspects. This situation creates difficulties in some cases when it is wished to carry out development plans involving homogeneous geographical and population criteria. Some countries have also introduced regionalization and have organized decentralized planning and administration development structure.

In a more advanced stage of decentralization some efforts have been made towards establishing within the regions, areas displaying a greater degree of homogeneity for the purpose of defining or implementing specific development policies due to the existence of similar organizational and problematical circumstances as well as other common features of an ecological, climatic or productive nature, etc. The determination of homogeneous areas consequently derives from a process of analysis and summarization carried out in successive stages in accordance with a structural concept, leading finally to a sub-division of the socio-economic regions into natural areas, population areas and economic areas. Rural areas constitute a type of homogeneous area characterized through their linkage with the primary sector of the economy.

3.2 The Concept of Integrated Rural Development

The conceptual view of integrated rural development is here interpreted in terms of the objectives and elements which are characteristic to it, without attempting a precise definition which would prove complex, limiting and of difficult application to the diversity of actual situations.

As a socio-economic, political and cultural process forming part of the process of global development of society, the essential aim of integrated rural development is to improve the living conditions of rural communities by mobilizing and organizing their members for conscious and critical participation in the analysis of their problems, needs and interests, the search for solutions, the adoption of decisions, and in the activities undertaken to improve their circumstances and overcome their difficulties. At the same time, this process also envisages modification of those organizational structures which contribute to marginality, the preservation and development of autochtonous social and cultural values, utilization of the community's own resources, and concerted action by the different institutional sectors concerned with the area.

This notion of development does not deny the existence of external stimuli, and even less of those elements of a structural nature which have led to the situations currently prevailing in rural areas; but it endeavours to make evident the central role that the rural community should assume in the mobilization and advantageous use of all resources, both internal and external.

The application of this development concept pre-supposes concerted and simultaneous action by all elements concerned in a substantial raising of the living conditions of the rural population. One of these elements, of course, is education.

It must be pointed out that such concerted and simultaneous action cannot be achieved without the support of coordinated inter-sectoral activity to promote the maximum advantageous use of the resources and potentialities in the rural areas and endeavour to respond to the changes arising in the minds, attitudes and motivations of the rural community. 1/

The notion of development here submitted requires that the activities to be put in hand be based on the true social, cultural and economic circumstances of the rural communities. In other words, it is required that the development of the community be the result of its own aspirations, desires, values, customs, attitudes and performance.

A central aspect of this approach is the participation of the rural community in all phases of the planning process with a view to ensuring greater consistency and adaptation to the needs, resources and objectives in each case. Each community is, in effect, the central axle of its own development in a triple capacity as subject, object and beneficiary; hence its participation constitutes a fundamental factor in the planning process.

The concept of integrated rural development implicitly involves acceptance of the existing potentialities in the rural communities and fundamentally in their human resources, in contrast to the position adopted by some writers who are of the opinion that it is not possible to expect the generation of change within the rural communities themselves without first instilling in them a certain degree of education.

3.3 The role of planning 2/

Development planning should regard the welfare of the rural population as the primary target of the strategy to be adopted, and not as a consequence of economic growth.

Under this concept it is the rural communities 3/ that, through participation in the process, should establish their requirements and the priority of their interests, joining in the task of improving their conditions to attain higher standards. In this respect, the principal role of planning is to bring about such participation and integration.

1/ This aspect is fully dealt with in the working documents drawn up at the Third Session of the Joint FAO/Unesco/ILO Advisory Committee on Agricultural Education, Science and Technology, Paris, December 1973. See in particular, ED-73/CONF. 506/6.

2/ This aspect is dealt with here following the line of thought expressed in the Final Report of the Meeting on the Implementation of the Recommendations of the Venezuela Conference of Ministers of Education (Panama, 9 to 14 February 1976). Santiago, OREALC, 1976.

3/ The rural community is seen here as the combination of individuals living in a given rural area, seeking to express their common concerns in an organized manner and to solve them through joint action.

The traditional method of planning establishes objectives, targets and strategies using as a reference framework a diagnosis resting chiefly on economic and social indicators of a national or regional character. On this basis, it establishes the necessary human and material requirements to implement the programmes and projects comprised in the plan. The central planning effort in this case is mainly concentrated on the co-ordination of responsibility by each sector of national activity in the endeavour to reach the pre-established targets in the time allotted by the plan for the completion of the various projects.

The integrated development of rural areas calls for a change of approach, entailing a reversal of the process. Planning should in this case establish mechanisms to enable detection of the real problems hindering development at the level of rural areas, namely of smaller extent than country or region. It is the community itself that should decide how, when and in what way it wishes to settle its difficulties, on the basis of its own priority criteria. But its role should not be limited to an expression of opinion since the community should also play an active part in the implementation and control of the projects decided upon.

To planning also falls the duty of adapting technical considerations to the activities and expectations of the rural community, as well as of making known their needs and requirements to implement the initiatives and ensure their compatibility with higher levels of authority.

In this way the bureaucratic pyramid of planning is inverted. No longer will it be necessary to contact most of the technical experts in the upper echelons of the administration. Instead, there will be a need for more specialists in community organization and in analytical and programming activities in the field.

The senior levels concerned with planning will have the responsibility of establishing the broad directives of cultural, social and economic policies for the country, and the requirements of integrated development will be consolidated accordingly.

On first consideration this new approach would appear both logical and feasible. It will nevertheless call for a change of planning procedures on the part of the planners, actors and beneficiaries involved. Above all, it will require acceptance at the political level, this being the more difficult as the degree of incompatibility may be greater between the aspirations of the rural communities and the class interests influencing the centres of power and decision.

3.4 Education and Integrated Rural Development 1/

The concept of education as a fector in integrated rural development includes preparation of the rural people for full participation in society at large. This

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1/ See: the Final Reports of the 3rd Session of the Joint FAO/Unesco/ILO Advisory Committee on Agricultural Education, Science and Technology, Paris, December, 1973 (especially ED-73/CONF 506/6) of the Meeting on the Implementation of the Recommendations of the Venezuela Conference of Ministers of Education, Panama, 9 to 14 February 1976; and of the Conference of Ministers of Education and those responsible for the Promotion of Science and Technology in relation to Development in Latin America and the Caribbean, convened by Unesco in co-operation with ECLA and OAS, Venezuela, 6-15 December 1971, Paris, Unesco, 1972.

concept only proves effective to an acceptable degree when education forms part of a more general process of change and of social and economic reforms of a structural nature. In this respect, education for the integrated development of rural areas should be at the service of the people, contributing to raise the organizing capacity of the rural communities enabling them to derive benefit from cultural assets and solve their problems and concrete economic and social needs. Participation by the members of a community is not always generated spontaneously; it is a result of an educational process in which information and comprehension of the facts are of basic importance. Although education has intensified the search for operational forms and mechanisms to provide an answer to this requirement, economic and social planning at the national level, and even at the regional level, are not always aimed, at developing the population of rural areas in accordance with this approach. In these cases the education sector should strive to institute work forms and mechanisms which come as close as possible to the concept of integrated rural development, encouraging integrated action by the agencies directly responsible for the sector with other bodies acting in rural areas and within an inter-institutional and inter-sectoral concept.

The foregoing does not imply that the education sector should lead the activities of integrated rural development; responsibility for this should be shared by the different institutional sectors acting in the rural area. But in the absence of initiatives of this nature, the education sector may promote them by means of activities directly related to education.

In all Latin American and Caribbean countries interesting initiatives are to be found directed towards this objective. Nevertheless, most are as yet simple explorations which do not achieve a status of national significance.

3.5 Educational Planning Levels and their Integration with other Sectors Responsible for Rural Development 1/

In spite of the specific nature of educational planning for rural areas, it cannot be issolated from the broader context of national educational planning.2/

1/ See: Romero, Simón and Ferrer, Sebastián, "O Planejamento da Educação", (Educational Planning), Brasilia, Ministerio da Educação e Cultura/Instituto Latinoamericano de Planificación Económica y Social (ILPES), 1976.

2/ There is an evident need to harmonize the interests of the rural population with the purposes of common good applying to larger areas, examining closely the consistency of micro and macro-planning, identifying those mechanisms which contribute to appropriate co-ordination between national and urban planning and rural planning. However, a study in depth of these aspects would exceed the purposes envisaged for this document. The present text is consequently limited to giving consideration to the principal planning levels and to stressing the importance of adequate co-ordination between them.

In this respect it may be said that educational planning constitutes a consolidated process which operates at various levels, namely:

i. inter-sectoral and sectoral planning at the national level;

ii. inter-sectoral and sectoral planning at the regional level;

iii. Inter-sectoral and sectoral planning at the micro-regional level;

iv. intersectoral and sectoral planning at the local level.

Educational planning for integrated rural development is linked with the aforementioned consolidated process, and is characterized within it as a specific form due to its concern with the primary sector of the economy. In relation to the aforementioned operating levels, it is most closely associated to regional, micro-regional and local planning.

On the other hand, as already pointed out, such integrated development is a complex proposition, the achievement of which only depends on the education sector. Its success will derive above all from the use made of planning and from inter-sectoral activity. A positive feature observed in this connection is that inter-sectoral activity offers little difficulty at the local and micro-regional levels: where difficulties arise they are mainly due to the bureaucratic rigidities and vertical habits of sectoral operations, generally imposed from senior levels.

Education is unable of itself to engender significant social and economic changes in the rural areas in the absence of a sustained dynamic and coherent policy animating and integrating the various sectoral activities.

On a political plane, planning at the area or micro-regional level is in practice subordinated to planning at the national level. This does not however, invalidate a planning effort at the area level, though the success of the latter is dependent to a considerable degree on its acceptance by the central authorities.

On a methodological plane it would appear advisable to apply a two-way concept, proceeding not only from the national to regional, micro-regional and area dimensions; but also in reverse, from area and micro-regional to regional and national.

Although totally autonomous area planning may be out the question, totally dependent and directed area planning is equally undesirable.

3.6 The Dimensions and Limitations of Educational Planning for the Integrated Development of Rural Areas 1/

In a well-structured and efficient development process, planning, decision-making and the carrying out of policies constitute continuous activities, with no dividing barriers. In endeavouring to determine the dimensions and limitations of

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1/ Coombs, Phillip H. Nonformal Education for Rural Development: Strengthening Learning Opportunities for Children and Youth. Essex, International Council for Educational Development, 1973. See also the notes mentioned under item 3.4.

educational planning for integrated rural development care should be taken to bear the foregoing criterion in mind, examining its technical, political and administrative aspects as integral and inseparable elements in a consolidated and indivisible process, and not as separate activities or responsibilities.

Technically speaking, educational planning for rural areas constitutes a systematic, interdisciplinary and participatory process of diagnosis of rural realities, of foreseeing educational needs in terms of integrated development, and of envisaging the activities and optional procedures necessary to satisfy those needs. Whilst being similar in some respects to other planning processes, a characteristic feature of educational planning for rural areas is that it is developed on the very foundations of rural realities, assuming the position of interpreter of their needs and channel for their expectations.

A planning process of this nature assumes that many tasks currently carried out far from the rural scene should henceforward be carried out within it. This can only be achieved if those responsible for planning have an intimate familiarity with rural life. It thus becomes necessary to decentralize planning as a technical solution which seeks to found itself on an accurate interpretation of rural realities. This without losing sight of the fact that central planning cannot be overlooked because of its global character and above all its linkage with the national political will.

Educational planning for rural areas is also closely associated with the political process of adopting decisions on educational aims and targets, priorities, and the allocation of resources and distribution of responsibilities. Its main function is to assist in improving that decision-making process. Planning will in effect serve little purpose if it does not assist the adoption of policies and action programmes and submit ideas for consideration in these respects.

But this planning method cannot be envisaged without the incorporation of qualified representatives of the community in those areas in the decision-making process by means of structuring appropriate participation mechanisms.

Educational planning in the rural areas can assist the decision-making process by providing basic data on the situation and needs of those areas, identifying expectations and trends and establishing criteria for the convergence of needs and decisions.

In its administrative aspects, educational planning in rural areas should draw up the co-ordinated programming of activities, the implementation of which will be entrusted to the community and local bodies; in the final analysis this form of planning seeks, as a practical objective, to ensure that the decisions adopted are carried out within a well-founded programming responding to the reality of rural conditions. This purpose is however not easy to accomplish. The habits and working methods traditionally employed in educational administration in the rural areas are in direct contradiction with the characteristics of a planned and participatory administration. In this regard little would be gained by incorporating the practice of participatory planning in an administrative context which does not understand or accept it.

Instead of viewing the planning process as the responsibility of an agency which of itself absorbs the planning function, the need is suggested for a generalized, participatory, inter-sectoral and decentralized process at the rural community level. Some limitations and resistance may nevertheless be expected in a process of this kind such as a possible reluctance to delegate the adoption of certain political decisions to local levels, difficulties of a technical nature which may mar the full efficiency of this planning method, and difficulties likely to arise in setting up an effective participatory organization.

4. CONDITIONS AND CHARACTERISTICS OF THE EDUCATIONAL PLANNING PROCESS FOR THE INTEGRATED DEVELOPMENT OF RURAL AREAS

The new method of educational planning for integrated rural development differs from other planning processes mainly in regard to its participatory and consultative nature. Since it is a new form of activity its experimental character is a salient feature. Experimentation, participation and consultation not only constitute specific characteristics of this method; they are also essential conditions for its application.

4.1 The Experimental Nature of Educational Planning for Rural Areas 1/

In its application to rural areas, planning follows a sequence of its own, emphasizing the experimental character of the process experimental in that an analysis of the activities carried out will show the way for the drawing up of new work proposals.

In this respect it is of great importance to take into account the main steps involved in the application of the experimental method as regards investigation in general and the planning of education for rural areas in particular. They are as follows:

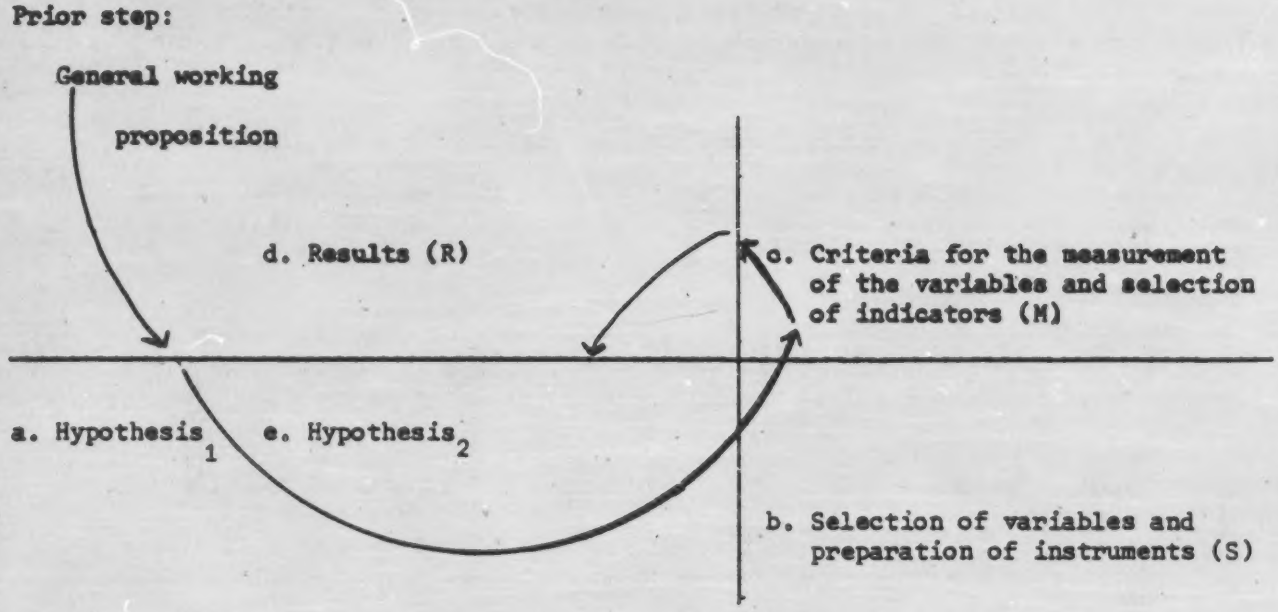
a. Formulation of a first working hypothesis on the basis of the planning objectives.
b. Selection of the analytical variables to be tested on the basis of the formulated hypothesis, and preparation of the most appropriate instruments of measurement.
c. Criteria for the measurement of the analytical variables and selection of indicators.
d. Verification of proof of the hypotheses (results).
e. Formulation of a new working hypothesis.

These steps may be observed in the following diagram.

1/ Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas. "El método experimental en la planificación de la educación". (The Experimental Method in Educational Planning). Guatemala, Project RLA/70/507 .NPP/Unesco. 1975 (Document prepared by Guy Le Boterf).

FIGURE 1

SCHEME OF THE EXPERIMENTAL METHOD


Prior step:
General working proposition
d. Results (R)
c. Criteria for the measurement of the variables and selection of indicators (M)
a. Hypothesis 1
e. Hypothesis 2
b. Selection of variables and preparation of instruments (S)

The prior working proposition in the experimental methodology may be expressed thus:

> The educational planning process for the integrated development of rural areas should be carried out with the effective participation of the rural community both in the phase of analysis and in that of programming: only in this manner will real consistency be achieved between the educational proposals on the one hand and the needs, interests and problems of the rural people on the other.
>
> An examination of the situation in its anthropological, social, economic, habitacional, ecological, educational, etc. aspects constitutes the initial step in the preparation of the educational plan for a rural area. This analysis should include a review of global and sectoral development plans and arrive at a summary of the problem leading up to a diagnosis which will serve as the basis for the general educational objectives to be established with the participation of the people of the area.
>
> The foregoing steps will help to formulate proposals for a transformation of the structure of the educational system for both in-school and out-of-school instruction. These proposals are tested in a simulation exercise which will enable examination of the various transformation options and their related strategies and selection of the most viable option.

The results of the foregoing will subsequently facilitate the programming of the educational attention to be given, its contents, and other components of the educational system of the area in consonance with its particular requirements. Implementation of this programming method will become possible based on a definition of the strategy to be followed. This strategy is the starting point for the drawing up of specific projects which will put into operation the programmed activities.

Finally, in order to ensure the succes of the planning process, it will be necessary to monitor and evaluate it systematically.

The ten principal working hypotheses and their variables this experimental methodology would be as follows:

Hypothesis 1: In view of the close relationship of the total social phenomena, in order to draw up educational plans for the rural areas (dependent variable) it will be necessary to proceed on the basis of the analysis of the situation (independent variable).

Hypothesis 2: Knowledge of the global and sectoral development plans (independent variable) will serve to guide the preparation of the educational plan for rural areas (dependent variable).

Hypothesis 3: There is a correlation between the diagnosis or summary of the problem (independent variable) and the preparation of the educational plan (dependent variable).

Hypothesis 4: In view of the importance of participation by the community in the planning process (intervenient variable), it will guide the drawing up of the educational objectives (dependent variable) on the basis of the diagnosis (independent variable).

Hypothesis 5: Once the objectives for the rural area have been formulated (independent variable) it is possible to design proposals for transformation of the educational structure, with reliance on the participation of the community (dependent variable).

Hypothesis 6: A simulation exercise (independent variable) based on the proposals for transformation of the educational structure (intervenient variable) as a result of proving the preceding hypothesis, will assist the preparation of the transformation strategy (dependent variable).

Hypothesis 7: It is highly probable that, for the purpose of joint planning with the community, both the options of attention to the population and the contents and other components of the educational system (dependent variable) it will be necessary to commence from the analysis of the situation, the review of global and sectoral plans, the diagnosis, the formulation of objectives, the design of proposals for the transformation of the structure, and a simulation exercise (independent variables).

Hypothesis 8: Definition of the strategies (independent variable) will serve to guide the implementation of the programme (dependent variable).

Hypothesis 9: The formulated strategies (independent variable) will also serve as a guide in the formulation of specific projects (dependent variable).

Hypothesis 10: The succes of the planning process (dependent variable) depends on its systematic control and evaluation (independent variable).

In the attached Figure 2 the operation of this experimental approach is shown in diagramatic form. The following points stand out in this diagram:

-The general working proposition (PG)
-The working hypotheses (H)
-The selection of variables to be tested for each hypothesis and preparation of the instruments (S)
-The criteria for measurement of the variables and selection of indicators(M)
-The results or proof of each hypothesis (R).

Thus, for example, on the basis of H_1, its variables and instrument of measurement are formulated, thence proceeding to the establishment of the measurement criteria and the selection of indicators, to arrive at the results or proof of H_1. On this basis the process continues with H_2 and so on consecutively.

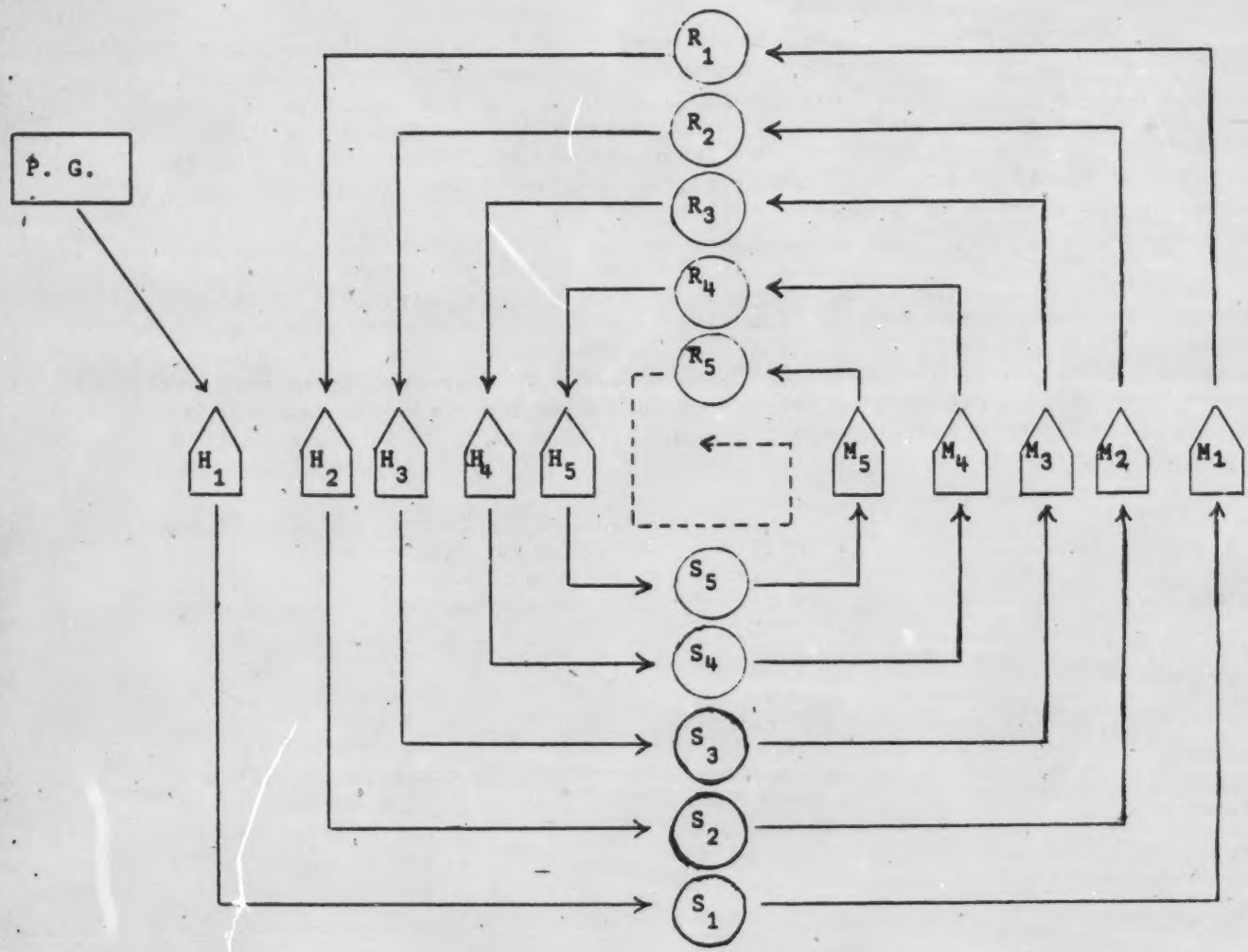
In this context it is also advisable to take into account some considerations which serve as guidelines in the experimental application of the method. 1/

In the first place, the sequential approach in educational planning for rural areas should be iterative and not lineal because it will be constantly necessary to turn back in order to review the action taken in a constant process of feed-back, coming and going between the different stages of the methodological process. Thus, after formulation of the hypotheses of transformation of the educational structure, it will be necessary to reconsider the objectives; similarly, the identification of resources may provide new criteria for a review of the hypotheses of transformation, bearing in mind that this planning method is a continuous process of enquiry, readjustment and refinement of data, information and decisions.

1/ Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas, "Cinco Principios para una Metodología de Planificación de la Educación". (Five Principles for an Educational Planning Methodology), Guatemala, Project RLA/70/507 UNDP/Unesco, 1975 (Serie CPER/Methodol./21).

FIGURE 2

EDUCATIONAL PLANNING FOR RURAL AREAS AS AN EXPERIMENTAL PROCESS



In the second place, care will be taken, in each stage, to gather only the relevant information, namely that which may be of use in the project, activity or hypothesis which it is desired to carry out, verify or investigate. In the initial stages of the planning work few relevant criteria are available since the hypotheses and action projects are almost always of a very general nature at the start. It is not yet known which data are of most significance and to a certain extent it will be necessary to accept the risk of employing some information which may turn out to be useless or superfluous.

In the third place, in order to preserve an over-all view it is also of great importance to consider at all times the interdependency of the various phases of the process. Thus, for example, in drawing up the diagnosis account should be taken of the final product which it is desired to obtain; or, when formulating the operational objectives their linkage with the problems detected in the area should be examined. In brief, the aim is to bear in mind at all times the methodology as a whole.

In the fourth place, it will also be advisable to introduce the concept of the foreseeable in the planning task. In this respect, care will be taken, not only to analyse the existing situation in the rural area, but also the predictable situations in the absence of decision concerning the dependent variable: in this instance the educational system. The foreseeable consequences and implications should also be considered in the action proposals being drawn up. By means of this anticipatory approach it is sought to reduce the uncertainty of the future.

Finally, it is important to explain in detail the criteria employed in the planning of education for rural areas. The analysis and diagnosis of the situation in a given area does not simply represent a passive and neutral observation of the realities involved. In studying a situation, forms, theories and concepts enabling the realities to be reconstituted are always drawn up. Language is also a structuring instrument.

4.2 The Participation of the Community

Participation is receiving increasing acceptance in contemporary society both for its instrumental value as for its capacity to stimulate co-operation and equality among the various social groups. It is frequently referred to as an indispensable means for the democratization of political and economic organizations. 1/

1/ Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas. "Pautas para un modelo de participación de las comunidades rurales en la planificación de la educación" (Criteria for a Model of Participation of Rural Communities in the Planning of Education). Guatemala, Project RLA/70/507 UNDP/Unesco, 1975, (Document prepared by Björn Fener).
Arnove, R.F. "Educación y participación política en áreas rurales de América Latina" (Education and Political Participation in Rural Areas of Latin America). In /"Educación hoy"/ A.P.E. Año III, Nº 16, Bogotá, 1973.

Experience in several countries has shown that, in general, country people perceive their problems, needs and possibilities differently from the officials who do not live in rural areas. It must be admitted that planning at the national level, due to its technocratic nature, isolated from the realities of rural life is often of a hermetic character; in many cases it does not contribute to an accurate interpretation of the expectations and needs of the rural population. It is nevertheless of the greatest importance to know what that population thinks and wishes as regards its own education.

The concept of participation undoubtedly lends itself to differing interpretations, with the result that its definition proves somewhat difficult and complex. In its application to rural areas it basically and ideally expresses a wish that the population in such areas may reach a point of power sharing within the national social system through effective intervention in the decision-making process. Participation by the country dweller implies his acquiring awareness of the condition of marginality in which he finds himself, inducing a group attitude capable of generating social, political and cultural transformations. The condition of marginality is in fact characterized by non-participation, and is of a generalized nature when the life of the greater part of the people is alien to the processes of decision. It cannot be denied that many of the decisions adopted at the national level are of benefit to the urban environment. The introduction of formulae capable of intensifying the participation of the country people in such decisions is tantamount to the establishment of formal changes in the current urban-rural relationship.

The following are mentioned as basic general conditions for participation:

-Interests and motivation
-Information and consciousness
-Participatory attitudes and conduct
-Organization
-Favourable political conditions.

As shown by experience, one of the principal obstacles to participation by the rural communities in the educational process lies in the difficulty of achieving effective mobilization of the people. Participation must be promoted and this implies a relatively protracted educational process. Moreover, there is a lack of tested techniques for the stimulation of community participation which may be applied regardless of the particular characteristics of each rural community. The mobilization of basic representative groups for participation in development processes also depends on the general political and juridical situation and should consequently be devised taking into account each specific situation.

As regards integrated rural development, it would be impossible to over-emphasize the importance of a participatory model which does not imply delegation of the deliberative process in a body of representatives but instead relies on the formalization and fostering of small groups with similar interests and activities within the rural community. Nationally such groups would constitute a starting point for the organization of general meetings for the discussion of common problems.

Participation at the level of the individual is of little import unless it is exercised through a basic representative organization. For this reason the role of education lies in promoting and stimulating the formation of such organizations in accordance with the needs of the disadvantaged groups. Where there is no community organization the formation and/or strengthening of grassroots organizations and different population groups should be encouraged, including women and young people, in pursuance of the objectives and interests of integrated rural development.

Traditional administrative structures do not favour the process of participation. Their decentralization as far down as grassroots level therefore becomes necessary. In a broad sense, participation involves decentralization and a dispersal of the administrative apparatus. It is evident, however, that decentralization and dispersal are not sufficient in themselves to achieve the effective participation of disadvantaged people. In order that effective participatory activities in the development process may be brought into operation, co-ordination among sectors, institutions, representative organizations, agents and members of the community is required.

As already mentioned, participation implies a sharing of power. However, the concept of participation is not confined to the policy-making sphere; in the case of rural communities it means that they themselves should additionally assume responsability in the execution of the programmes.

A model of collaboration by rural communities in the educational process should include complementary activities capable of encouraging the effective growth of community participation. In so far as the formulation of educational policies is concerned, efforts should be made to ensure access of the rural communities to the decision-making process. In the execution of programmes consideration should be given to the need for achieving greater autonomy on the part of the rural communities in the carrying out of certain educational activities. Their active presence in the processes of decision and execution is of more interest in practice than the existence of a formal participatory structure.

The approach and strategies to be adopted for the dynamic integration of rural communities in the educational process will depend upon each particular situation. The forms of participation may be extremely varied and range from simple consultations to self- or joint-management.

Whatever the method adopted, it is desirable that participation should operate in all phases of educational planning, from diagnosis to evaluation. Particular importance is ascribed to an initial phase of participatory diagnosis both for the purpose of achieving a closer adaptation of planning to concrete realities, and for that of encouraging an effective commitment on the part of the community in this process. From this point onwards the social groups express and analyse their interests, wishes and aspirations, discern attitudes and acquire a growing realization of the value of existing resources.

These activities may be carried out by means of meetings, informal talks or community activities, through the participation of agents and of formal and non-formal groups of greater influence in the communities. Through the support and vitality of such agents and groups, the unfolding of a process of interaction and participation will become possible. In this respect, the educational community itself may take up

the role of principal conducting agent and stimulator of the process of interaction and participation; in view of its extent and nature, the educational sector could certainly be the main motivating force in these processes of community indoctrination, organization and promotion.

To sum up: the following conclusions regarding the process of participation deserve mention: 1/

i. The participation of the rural communities is a basic condition for the achievement of integrated rural development. It forms part of the educational process and, as such, should stem from the community with no extraneous influences. Otherwise participation cannot exist.

ii. Participation does not consist of searching for short-term solutions but of understanding the how, why and purpose of taking part. Basically, participation comes about when there is awareness of the realities of the immediate surroundings, the related problems and needs are felt, and it is possible to take action to achieve their transformation.

iii. It is very difficult to establish mechanisms, methods or strategies for community participation valid for all circumstances. Such mechanisms, methods and strategies will be formulated according to the characteristics of each area and taking into account its particular socio-economic, political and cultural context.

iv. Participation by basic representative organizations should be present in all educational planning processes, from the analysis of the rural realities to the proposals of change and execution of the activities leading to the transformation of the prevailing situation.

v. As an integral part of the educational process, participation should be reflected in the curricular approach, for both in-school and out-of-school instruction.

vi. The promotion of participation bears a similarity to the transmission of diffuse knowledge to makers of handicrafts: the object or prescription may be suggested, one may collaborate in preparing the mould or in aplying the prescription, but the individual style will depend upon the artisan himself. So,also, should the style of participation derive from the individual character of each rural community.

1/ Regional Workshop on Educational Planning Methodology for the Integrated Development of Rural Areas. (Brasilia, 6-10 November 1978). Informe Final (Final Report). Brasilia/Santiago, MEC/OREALC, 1978.

4.3 Consultation

The analysis of the true rural situation, the proposal of development objectives, the formulation of the hypotheses of structural change, and the programming of the various components of rural education are tasks which do not only involve the educational planner. It is of great importance to ascertain through relevant consultation, what are the thoughts and wants of technical specialists, among them those entrusted with rural development and the authorities of the area. Confrontation of the formulated hypotheses with certain bureaucratic customs and inhibitions of a political nature may lead to re-adaptations which, if promptly carried out, will facilitate adoption of the proposals and avoid the possibility that the planning activity may prove fruitless.

Due to the inter-disciplinary nature of educational planning for rural areas, it is also advisable to encourage consultation with specialists in differing scientific fields. In this respect it is necessary to establish forms of co-operation among educational planners and technical specialists in the various sectors - agriculture, health, labour and others - taking part in the rural development programmes.

This collaboration should apply equally to the identification of problems and to the formulation of solutions, thus ensuring that the proposals of the educational sector are drawn up taking into account the reciprocal influence of development in each sector.

Finally, in order to ensure effective interaction between the development plans of the different rural areas in a country and the national plan, in drawing up the former account will be taken of the framework of national development policies. This will make it necessary to establish regular channels of contact between those responsible for rural planning and the national authorities, since it is practically impossible that the development plans in a given rural area should prosper without the firm support of the national authorities.

Bearing in mind these particular aspects of educational planning for rural areas, methodologies and instruments should be drawn up to facilitate the aforementioned interchanges; specifically the following:

i. Inter-sectoral consultation with technical specialists in other institutional sectors concerned with social and economic activity in order to gain security for the proposals and promote compatibility in the programming process.

ii. Intra-sectoral consultation with the personnel concerned with education in the rural areas (technical specialists, teachers, senior staff, administrators, students and heads of families), to ensure the fulfilment of objectives, targets and activities.

iii. Consultation with high-level specialists such as university professors and investigators, to ensure the scientific and inter-disciplinary character of the planning process, to take advantage of the result of investigations and enrich the analysis.

iv. Consultation with authorities to ensure their interest in development, and the adoption of appropriate decisions favourable to integrated rural development.

These processes of consultation and participation with different groups do not strictly speaking represent concrete phases in the educational planning activity for rural development. Rather are they components which should be present throughout the planning process, in order that it may be duly influenced and, eventually, re-modelled.

The decision factor is in any case an integral part of every planning process. The very fact of adopting the planning of education for rural development as a work system is in itself a political decision. Also a political decision is the definition of the sphere and scope of the planning activity, as well as its character, which may be of an imperative or simply of an indicative character. Only direct and constant contact on the part of the technical specialists with those responsible for the formulation of policies will enable the latter to receive regular information regarding the progress of activity and to adapt their decisions in accordance with actual circumstances and requirements. Technical specialists will not be in a position to arrive at the definite formulation of an educational plan for rural areas before those entrusted with the adoption of decisions have examined the various options and made their choice.

However, in the planning of education for rural areas it is not always easy to establish this technical and political inter-relationship. For its achievement certain pre-requisites appear necessary.

In the first place it is imperative that there be a favourable attitude at the political level towards rural development, thus implying the existence at this level of a strong social motivation and a firm will to hasten the necessary changes. A way of ensuring this requirement may be through a general process of communication and sensitization. Only if such an attitude is adopted will it be possible to consider the planning of education for rural areas as a useful and appropriate working instrument. Where this attitude is non-existent, planning runs the risk of becoming something superfluous, or even a brake on development.

Secondly, educational planning for rural areas should of necessity demonstrate its usefulness and efficacy. Hence the importance of managing the process through a practical and viable working methodology.

Thirdly, the planner should be conscious that it is not he who adopts the political decision to apply a plan, a decision which, moreover, is not solely dependent on technical considerations. Hence the importance of putting forward the proposals in a realistic framework.

Fourthly, it is advisable not to overlook the fact that the basic problems of rural areas are of a political rather than of a methodological nature. The planner will always be conscious of the fact that a methodology, no matter how well devised, is not in itself sufficient to settle such problems. If certain structural changes are not introduced, the integrated development of rural areas will remain in the realm of good intentions.

5. THE PROCESS OF EDUCATIONAL PLANNING FOR RURAL AREAS AND ITS MAIN COMPONENTS 1/

5.1 Outline of the Process

The diagram shown on the following page describes the principal components of the process of educational planning for rural areas. The arrows show the normal sequence of the activities to be carried out, whilst the dotted lines indicate the main flows of feed-back and interaction of the different components as well as the over-all character of the process.

As may be seen from this outline, the participation of the rural community and of the authorities is not viewed as an isolated procedure but as a condition which should prevail throughout the process.

As the most salient features, attention is drawn to the integrated and participatory diagnosis and to the planning process.

Rather than a detailed diagnosis, what is imperative is that the community should acquire a growing realization of the main problems which it faces and which impede its development. This awareness will lead to the need for selecting priority projects and deciding on which to take action. A diagnosis of this kind need not constitute a macro-analysis in which every aspect is considered; but rather an individual diagnosis of each problem -and of its inter-relationship with other features impinging on it- from which will stem the planning of suitable educational solutions.

Programming will also be limited and localized, thus facilitating its execution and evaluation. The fact that plans will be drawn up for priority projects on no account implies disregard of integral sectoral planning; the latter will however be the outcome of a spiral rather than a lineal planning process, starting with local programmes which will lead to an ever increasing awareness by the community of its own problems.

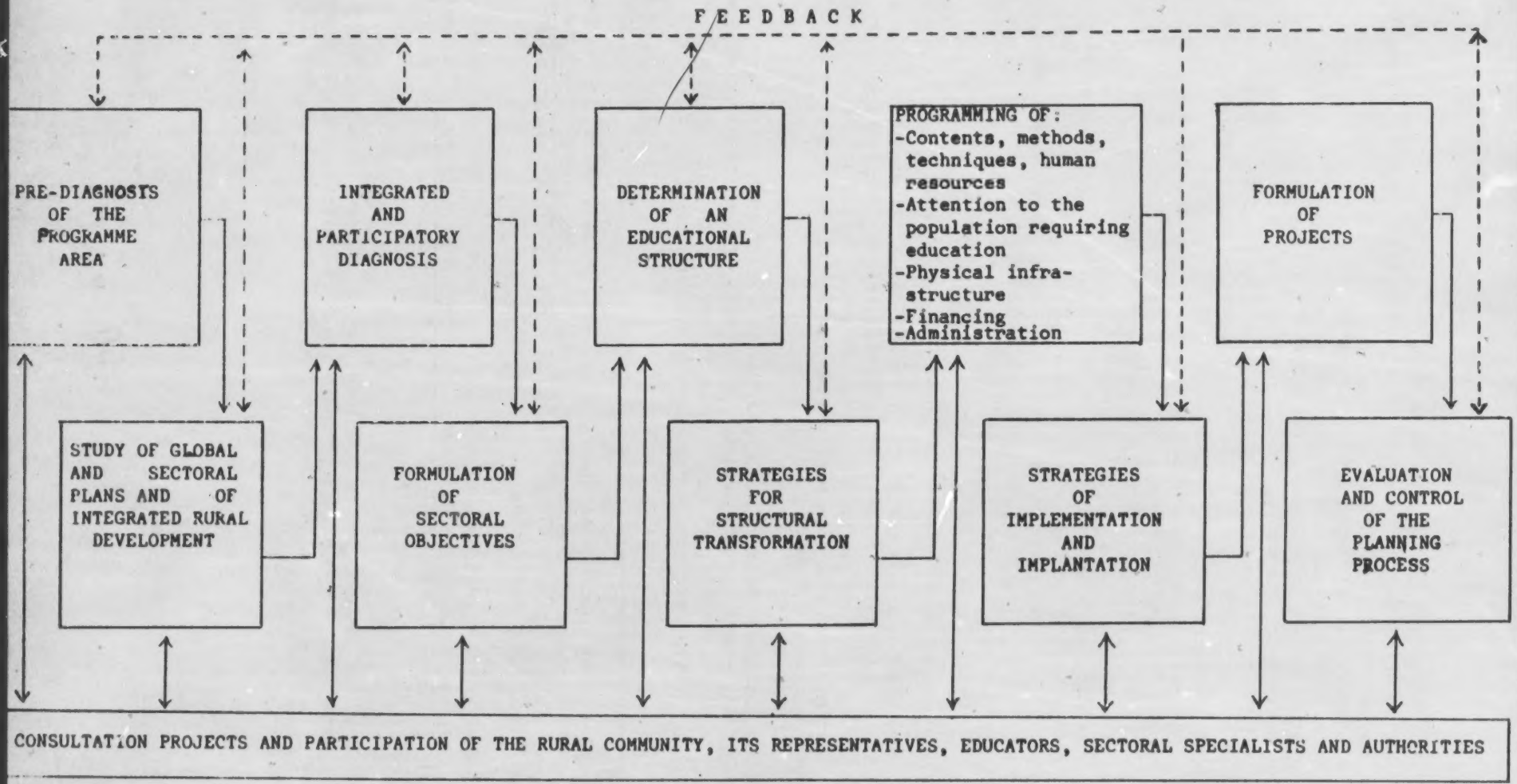
5.2 Identification of the Various Components

Educational planning for rural areas is similar to other social planning processes as regards the type of activities comprised and their timing and sequence. In endeavouring here, for practical purposes, to desegregate the process, attention is drawn to its components, as follows:

1/ The presentation here put forward regarding the process of educational planning for rural areas represents a summary of the conclusions reached on the basis of the theoretical issues raised and practical work carried out by the Unesco Regional Office for Education in Latin American and the Caribbean in co-operation with various institutions, especially on the occasion of the National and Regional Courses on Educational Planning and Administration for the Integrated Development of Rural Areas held in different countries of the region between 1974 and 1978 and of the Regional Workshop on Educational Planning Methodology for the Integrated Development of Rural Areas held in Brasilia, Brazil, from 6 to 10 November, 1978.

FIGURE 3

OUTLINE OF THE PROCESS OF EDUCATIONAL PLANNING FOR THE INTEGRATED DEVELOPMENT OF RURAL AREAS


FEEDBACK
PRE-DIAGNOSIS OF THE PROGRAMME AREA
INTEGRATED AND PARTICIPATORY DIAGNOSIS
DETERMINATION OF AN EDUCATIONAL STRUCTURE
PROGRAMMING OF:
-Contents, methods, techniques, human resources
-Attention to the population requiring education
-Physical infra-structure
-Financing
-Administration
FORMULATION OF PROJECTS
STUDY OF GLOBAL AND SECTORAL PLANS AND OF INTEGRATED RURAL DEVELOPMENT
FORMULATION OF SECTORAL OBJECTIVES
STRATEGIES FOR STRUCTURAL TRANSFORMATION
STRATEGIES OF IMPLEMENTATION AND IMPLANTATION
EVALUATION AND CONTROL OF THE PLANNING PROCESS
CONSULTATION PROJECTS AND PARTICIPATION OF THE RURAL COMMUNITY, ITS REPRESENTATIVES, EDUCATORS, SECTORAL SPECIALISTS AND AUTHORITIES

-Pre-diagnosis of the programme area
-Study of global and sectoral development plans and of integrated rural development projects
-Integrated and participatory diagnosis
-Formulation of sectoral objectives
-Determination of an educational structure
-Strategy for structural transformation
-Programming of contents, methods, techniques, and human resources; of the attention to be given to the population requiring education; of the physical infrastructure, of financing and of administration
-Strategy of implementation and implantation
-Formulation of projects
-Control and evaluation of the planning process

Despite the existence of a certain sequence of the components, it is not appropriate to deal with them as successive activities or stages, since in the educational planning process for rural areas -which is markedly iterative- the relationships and dependencies operate in multiple directions and over differing periods of time.

5.2.1 Pre-diagnosis of the Programme Area 1/

Pre-diagnosis is carried out with the object of exposing the most significant aspects of the situation prevailing in the programme area. It presupposes a prior examination of the characteristics of the rural areas at the national level and of a regional and/or national diagnosis providing a general reference framework.

In the analysis of rural realities two basic principles have become increasingly consolidated, namely: a) The analysis should be multi-disciplinary and inter-disciplinary; b) An isolated sector -in this instance education- is unable to provide sufficient response to all rural problems.

1/ Course on Educational Planning and Administration for the Development of Rural Areas. Metodología para a Análise Integrada de Educação nas Zonas Rurais. (Methodology for the Integrated Analysis of Education in the Rural Areas). MEC/SG. Rio Grande do Norte, 1976.

-Regional Office for Education in Latin America and the Caribbean. Elementos básicos para la programación del desarrollo de la educación rural (Basic Elements for the Programming of Development of Rural Education). Santiago, Chile, 1976.

-Regional Workshop on Methodology for Educational Planning for the Integrated Development of Rural Areas. (Brasilia, 6 to 10 November 1978). Informe Final (Final Report). MEC/SG, Unesco/OREALC, Brasilia-Santiago, 1978.

To achieve the desired inter-disciplinary and inter-sectoral conditions, an attempt will be made to identify the relationships effectively operating between sector and fields, endeavouring to avoid too high a degree of abstraction.

In the selection of fields of analysis two methodological elements which constitute fundamental requisites in this connection should be taken into account: the theoretical model, which explains the role of education within rural development, and a system of hypotheses bringing into evidence the objectives pursued.

In this task an analysis is made of those fields which best define the level of development in a rural area and which may be of greatest relevance for the formulation of an educational plan for the area concerned. Analysis of the following is suggested:

-The environment
-The population
-Health
-The socio-cultural structure
-The economic structure
-Communications
-Political-administrative organization
-Education

It is also suggested that account be taken of the socio-economic situation and structure of the region and country in which the programme area is situated. The analysis and diagnosis should not be so concentrated as to convert the local realities into an isolated situation; it is consequently advisable to consider the interdependencies existing between the programme area and the realities at the regional and national levels.

The pre-diagnosis may comprise:

a. Examination of the existing ties and inter-relationships between the fields considered

b. Examination of the existing relationships between the various particular features of the area and education with a view to determining the degrees of dependency and the mutual conditioning factors between education and the combination of features detected, and

c. Determination of the essential elements which influence educational results.

It is recommended to examine the most significant links between the education sector and the other fields concerned with rural development, attempting to avoid exhaustive conclusions for each field.

For the purpose of selecting indicators account may be taken of any studies dealing with concrete experiences of the inter-relationships between socio-economic indicators. However, it is necessary to point out that most of the studies carried out in this respect refer to macro-conditions and

should be adapted and supplemented before being used for the purposes of the educational planning methodology for integrated rural development. Obviously, the task should not be limited to a quantification of indicators but should take into account the information provided by qualitative studies such as, for example, those of an anthropological nature.

In this preliminary stage, information is gathered which will enable the subsequent steps to be tackled. The technical character of this task is not inconsistent with the effective participation of the community in its performance: its participation is the more important since the results obtained should subsequently be compared with the community diagnosis as such, giving place to a more precise identification of the problems of the programme area.

5.2.2 The Study of Global and Sectoral Plans and of Integrated Rural Development Projects

Examination will also be made of the position as regards national and regional plans of a global nature, and the proposals which they contain studied in relation to activities affecting rural development in general and, specifically, that of the area being considered for the planning of education. From such plans should be extracted the diagnoses, objectives, programmes, financial forecasts, information concerning the role assigned to education and all other particulars of information which may provide guidance to the educational planner for rural areas or which represent future circumstances requiring educational support.

Various agencies, particularly those in the agricultural and health sectors frequently give attention to rural areas in their sectoral plans. If this is seen to be the case, the information and forecasts which they contain regarding the rural area should be studied for incorporation into the proposals being drawn up for the educational sector to the extent that they may be useful and compatible. In particular, this task should lead to the preparation of an up-to-date inventory and evaluation or programmes and projects, both private and public, of a sectoral and inter-sectoral nature carried out in the area since they may be exerting a meaningful impact in the area which should be taken into account in the analysis of the project in hand.

In some Latin American and Caribbean countries initiatives or projects for integrated rural development are being introduced which favour the establishment of educational planning with a view to that development. Where this is the case, the educational planner for rural areas will endeavour by all means possible to achieve the full convergence of his proposals with those contained in such projects.

Finally, it should be pointed out that this stage of the methodology also opens up the possibility of feedback to the global and sectoral plans and projects. Certain information regarding problems of the area and its real needs will in effect enable the responsible agencies to introduce adaptations and adjustments in accordance with the specific realities and expectations of the community.

5.2.3 Integrated and Participatory Diagnosis of the Programme Area

Having completed the aforementioned stages, efforts will be directed towards a global and integrated diagnosis of the area a process of condensation, the main purpose of which is to make as accurate an assessment of the situation as possible.

Whereas the methodology continues to emphasize to the full the effective participation of the community in all stages of the planning process, from pre-diagnosis to definition of the global objectives and election of the operational activities, the participatory character of the diagnosis is particularly stressed. It is not a question of putting forward a simple description of facts but of the community identifying the favourable factors and main problems or contradictions which it faces or may face in the near future, and which constitute, or may come to constitute, serious hindrances to its development 1/.

The contradictions in rural areas are generally of many kinds, mainly of a social, economic and political nature. It is important in this context that the diagnosis should not be limited to an identification of the problems; it should also facilitate an understanding of the main causes of the ruling situation as well as the inter-relationships between those causes to enable, in a subsequent stage, the adoption of strategic decisions in the education sector in accordance with their relative importance.

The diagnosis should also be of an integrated nature, taking into account all the aspects comprising the global situation in the programme area. To achieve this purpose it is considered advisable to formulate the problems and contradictions found in each of the fields in the pre-diagnosis stage, and establish the inter-relationships observed between those problems and contradictions.

As has already been mentioned, both the identification of the problems and contradictions in the area and the assessment of their exact nature, relevance and causes should be carried out with the active participation of the community, this being understood in a broad sense, incorporating representatives of basic organizations, families, teachers, authorities and other groups in the community.

But the diagnosis should not be limited to an identification of the problems. It is also important, jointly with the community and based on the problems observed, to identify the needs and interests felt by the community and which tend to be overlooked in diagnoses of a traditional nature.

1/ Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas. "El planteamiento de los problemas en un diagnóstico". (The Treatment of Problems in a Diagnosis). Project RLA/70/507, UNDP-Unesco, Guatemala, 1975.

To summarize, the participatory diagnoses should fundamentally comprise the following phases:

i. Internal organization of the communities for the participation process.

ii. Identification by the communities of their problems, needs and interests.

iii. A diagnosis, carried out jointly with the communities.

iv. Comparison of the diagnosis with the pre-diagnosis or reference framework.

v. Re-formulation of the diagnosis jointly with the community.

A diagnosis carried out in this manner will constitute an excellent base for the subsequent task of educational planning, particularly in the definition of educational objectives.

5.2.4 Formulation of the Sectoral Objectives

The stage of establishment of the problems of the area through joint discussion by community and planner being completed, the task continues with interpretation of the global development objectives of the area as a starting point for the determination of the objectives and responsibilities of the education sector. For this purpose, in addition to the conclusions reached on the basis of the area realities, two fundamental aspects will be taken into account, namely the desires for change expressed by the community itself, and the political framework.

On the basis of the study of global and sectoral development plans, the broad guidelines at the political level will be discerned, and the time periods and strategies required to achieve certain changes. Thus, it may perhaps appear that great interest is shown in integrated rural development in general, and more particularly in the area under examination, in which case the education sector will have many opportunities of carrying out activities of a truly innovative nature in support of this aim. It may, on the other hand, happen that only isolated activities or sectorally-promoted development programmes are in evidence. In this event the opportunities of integrated development with the participation of the education sector will be reduced. But even where no explicit intention of change in the rural area is noted at the political level, the possibility of achieving certain integrated development objectives will subsist based on activities generated by the community itself; in this respect information is available regarding projects successfully put into effect by rural communities without any outside assistance.

In the event that contradictions are encountered or foreseen between the political definitions and the aspirations of the community, the planner will strive to establish a compatibility of objectives and search for mechanisms for communication between the political groups and representatives of the communities.

The integrated development objectives having been established, those of the education sector should be developed within that context. Clearly, the educational objectives will be differently directed if integrated effort among the various institutional sectors is already in action in the area.

In the planning of the educational sector, three levels of objectives are generally distinguishable, 1/ namely:

-The aims of purposes relating to concepts of an abstract character and which therefore have no direct operational implications. Aims such as "the democratization of education" are defined independently from specific activities. They are important because they serve to guide behaviour, but for purposes of action it is necessary to consolidate them in terms of time and space in the form of general and operational objectives.

-The general objectives which provide the reference framework for the educational plan and indicate the direction in which it is desired to go and the broad directives which should be reflected in the activities to be promoted by the education sector. They are formulated in terms of action such as "to give form to an educational system in support of integrated rural development", or "to utilize the technologies of social communications to broaden the coverage of educational activity".

-The specific objectives and targets which identify the activities to be carried out, and which quantify and qualify the results to be obtained, establishing them in terms of time and space. As regards the contents, specific objectives may be expressed in terms of observable or appraisable performance, as, for instance: "that the entire adult population of the area be capable, by 1985, of adopting preventive measures for the preservation of their health through the identification of those habits and customs that favour infectious diseases". A localized and quantified target would be, for example: "that by the year 1985 not less than 80% of the adult population of the area be participating in community activities in support of integrated development, with an educational level sufficient for adequate performance by the community". 2/

It should be made clear that in this stage of the process only general objectives are established. Specific objectives and targets will be arrived at later, on undertaking the programming of the various elements comprising the educational system.

1/ See: Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas, "Sistemas de valores, objetivos generales y objetivos operatorios", (Systems of Values, General Objectives and Operational Objectives). Project RLA/70/507, UNDP-Unesco, Guatemala, 1975.

2/ The example is based on the scheme of curricular organization of common acceptance in Latin America.

5.2.5 Determination of an Educational Structure 1/

Once the diagnosis of the situation and the proposed educational objectives have been drawn up, the planner will proceed with the determination of an educational structure adapted to the needs of the area, this being understood as the combination of levels and methods of school and out-of-school education which it is intended to impart. The first structural outlines will be of a very general character, barely founded on the will to change what exists 2/. But, as the planning process advances, the hypotheses of transformation will be defined with greater precision, always in consultation with the community.

It is as well to remember that educational planning for rural areas is an envelopmental and not a lineal process; in this respect the participation of the community and the consideration given to its needs, interests and problems will facilitate the constant up-dating and adaptation of the proposals on educational structure.

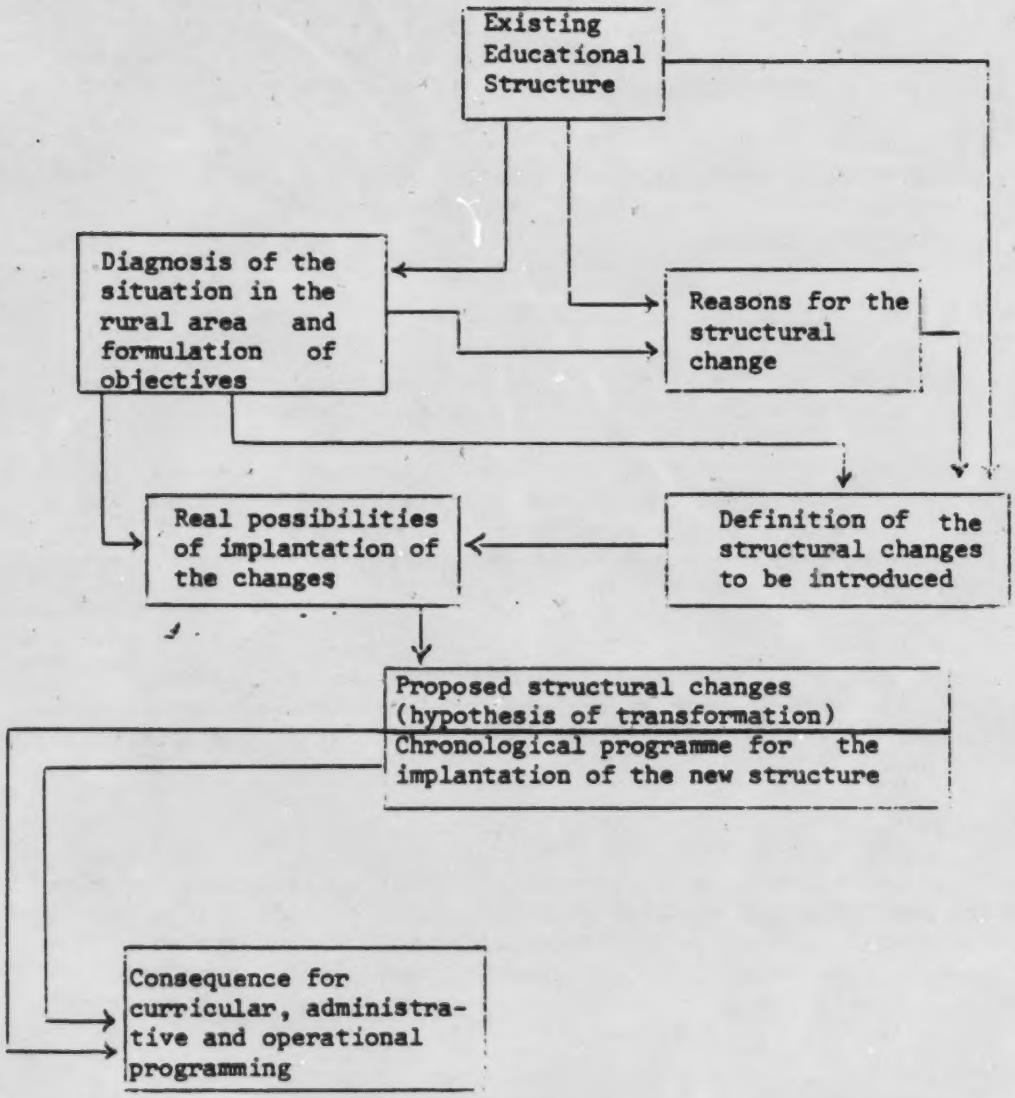
The definition of hypotheses for the transformation of the educational structure for rural areas may take the following steps (See Figure 4):

a. initial definition of the reasons for the structural change, based on the results of the diagnosis; b) determination of the changes which should be introduced in the different types, levels and methods of education in existence in the programme area; c) examination of the real possibilities of implementing the changes, taking into account the resources available and the limiting factors which may emerge; d) proposal of those structural changes which are considered feasible in the light of current limitations; e) establishment of a calendar for the implantation of each of the components of the new structure; and finally, f) determination of the practical consequences which each hypothesis will have on the subsequent programming tasks.

1/ See: Regional Office for Education in Latin America and the Caribbean "El proceso de la planificación de la educación rural. Algunos alcances metodológicos para la formulación de una estructura educacional adecuada a la situación específica de una zona rural". (The process of planning rural education. Some methodological considerations for the formulation of an educational structure adapted to the specific situation of a rural area). Santiago, 1976.

2/ The structure of education in rural areas in most countries of the region currently comprises in-school instruction concentrated in the main on the first primary educational grades, and some isolated out-of-school educational programmes.

FIGURE 4


Existing Educational Structure
Diagnosis of the situation in the rural area and formulation of objectives
Reasons for the structural change
Real possibilities of implantation of the changes
Definition of the structural changes to be introduced
Proposed structural changes (hypothesis of transformation)
Chronological programme for the implantation of the new structure
Consequence for curricular, administrative and operational programming

5.2.6 Strategy for a Structural Transformation

The various hyphotheses will be tested by a simulation exercise in order to gauge their feasibility and the type of activities required by each. On completion of this exercise the planner will be in a position to draw up a strategy of transformation, selecting the most viable route and establishing the principal operations involved in the strategy in the short and medium term. This strategy will also establish the responsibilities assigned to the community and its basic organizations as well as to each sector and the various institutions operating in the area.

The simulation exercise will consist of a global estimation of the following aspects for each of the hypotheses of transformation.

-The population coverage for each educational programme.

-The new orientations of curricular change.

-The mechanisms of inter-sectoral and intra-sectoral co-ordination based on the responsibilities arising from each hypothesis.

-The requirements of human resources, equipment and financing caused by the new structure and new curricular orientation. As regards human resources, these will have to be prepared specifically for the new educational concept, since non-traditional requirements may arise such as motivators, monitors, technical specialists, artisans or experienced agriculturists.

This exercise will consider the maximum possible utilization of the contributions of the community in terms of labour and assistance with the organization of activities, as well as of the existing communitarian and institutional infra-structure.

5.2.7 Programming

Once agreement has been achieved on the basic orientation of future activity and regarding the hypothesis of structural transformation judged to be the most suitable and viable, programming will be undertaken of the various elements comprising the educational system, namely: population to be attended, contents and methods, human resources, physical infra-structure, technology, equipment, financing and organization 1/.

1/ Latin American Course on Educational Planning and Administration for the Integrated Development of Rural Areas. "Propuesta de Plan de Educación del Departamento de Sololá, 1976-1980-1985". (Proposal of an Educational Plan for the Department of Sololá). Chapters 3, 4, 5, 6 and 7. Guatemala, Project RLA/70/507, UNDP-Unesco, 1975.

Programming fundamentally consists of determining the activities that should be carried out to achieve the established objectives with the resources available, and also of establishing the timing, sequence and localization of those activities.

Programming will start by fixing the operational objectives -specific objectives or targets- for each element of the system, endeavouring to state the observable and appraisable results which it is hoped to achieve by the end of the plan for each of the educational methods defined in the structure. It is advisable to exercise great care in this task since it will facilitate the subsequent programming work.

The programmer should bear in mind that the real possibility of reaching the objectives in the predetermined periods is closely associated with the availability or otherwise of resources, these being considered in their broadest sense. For this reason, care should be taken to ensure that the action proposals formulated at this stage consider, on the one hand, the rational utilization of resources already available and, on the other, identification of non-conventional resources, mainly at the community level. Whereas the proper use of resources is a matter of major interest at the national level, its effects are considerably more sensitive at the operational levels, and specifically in the rural areas. In this connexion the programming of education for rural areas should make it possible to introduce substantial improvements of a quantitative and qualitative type, through re-arranging the use of the already available resources and of others which may be obtainable.

Programming should include consideration of differing options related to the spatial and temporal dimensions of educational activity, the distribution of opportunities by population groups, the selection of contents, and allocation of the financial resources. Answer should thus be provided to such questions as "which contents best respond to the idiosyncracy and characteristics of the area?"; "how should the resources be distributed among the methods of education?".

Although some proposals will appear to contradict others, they will not always be mutually exclusive in absolute terms; for example, they cannot pose a choice between the expansion or the quality of education in rural areas. Furthermore, in certain instances it will be necessary, within certain limits, to recommend seemingly opposite proposals. Thought will for instance have to be given to education for the more underprivileged groups and to education for the population as a whole; and to education in the base year compared with that to be given in future years. For the programmer the problem fundamentally lies in estimating the proportion in which the various elements should be considered.

The volume of available resources is an important aspect to be taken into account in this stage of programming. Since the resources for rural areas are generally limited, certain selective activities might have to be sacrificed in order to achieve a better distribution of opportunities.

Whereas programming inevitably involves technical considerations, this is no reason for the community to be absent at this stage. Quite the contrary. the adoption of decisions will be facilitated to the extent that the community plays an active part in establishing priorities.

From this it follows that educational programming for rural areas fundamentally seeks a qualitative and quantitative expansion of educational activity, together with a high degree of efficiency in the use of resources. In the final instance the aim is to identify, together with the community, the combination of variables which may provide assurance in the programme area of more education better suited to its needs and with the least possible use of resources.

This stage includes the following tasks: a) programming of the population to be attended; b) curricular programming; c) the programming of human resources; d) programming of the physical infra-structure and equipment; e) programming of the use of technology; f) programming of the organization and administration of education; g) financial programming.

The main aspects to be taken into account in each of these programming activities are dealt with hereunder:

a. The Programming of Options of Attention to the Population consist fundamentally in examing optional coverages and flows of the population to enable fulfilment of the objectives established within the adopted structure, assigning to each of these options a distribution in terms of time and space. This task will include the elaboration of proposals for both formal and non-formal education. Treatment of the subject cannot be confined to partial aspects of the diagnosis of supply and demand and to an analysis of the enrolment flow. The traditional model of descendent planning reduces programming to the treatment of the school system without considering other options of attention to the population requiring education, such as the out-of-school and non-formal programmes. Merely to quantify the scholastic short-fall would imply acceptance once again of that traditional model.

By means of this exercise, which should be consistent not only with the general methodological approach but also with the other phases of programming an attempt should be made to provide answers, with validity for the short, medium and long terms, to questions such as: "to whom is attention to be given through the educational activities"? (e.g. population groups, age groups, categories of students); "what kind of education is to be given to each population group"?; "what prior educational levels will be required"?.

Taking into account the objectives already established and the proposed new educational structure, as well as the information and data concerning the base year which reflect the characteristics of the programme area, the programmer proceeds to draw up forecasts by sex and age groups and to formulate quantitative proposals on the population to be attended, via both school and out-of-school instruction.

The forecasts are drawn up with adjustments in the rates to allow for the gradual correction of existing educational discrepancies. The methodology calls for the use of easily understood symbols and of straight-forward forecasting models which at the same time permit the establishment of proposals closely approximating reality.

Programming in this manner will represent a new approach, consisting on the one hand in presenting the peculiarities of education in the rural areas, and, on the other, the association of education with integrated rural development. For this reason the flows at the local level will show different characteristics from those at the global planning level (national, state, regional or provincial) which represent a form of descendent planning.

Finally, as in the other stages of the process, it is essential to consider the participation of the community in the programming of options of attention, both in the study of targets and choice of options and in the short, medium and long-term forecasts, particularly insofar as forms of out-of-school attention are concerned.

b. The Programming of Contents and Methods is based on a new curricular concept, namely development of the curriculum at the level of the community.

This task commences with a description of the main characteristics of the target population for each educational method proposed in the structure.

Thereafter, within the option being applied, the planner would proceed to formulate the conditions of enrolment and the observable and appraisable operational objectives for each method 1/. The training itineraries or objective sequences would then be worked out and the units of content would be defined for each together with the appropriate strategies to achieve them, such as technologies, methods, type of teacher, rhythm of activities, place where they are to be carried out, evaluation, etc. It is believed however that, in respect of the central option being applied, the participation of the community would tend to be less relevant, this being in contradiction with the general methodological approach.

A possible alternative more in harmony with the methodology adopted would perhaps consist in passing on from the determination of the characteristics of the target population to the identification of their interests and problems, and thence to the programming of actions, activities or projects. Within this concept, the selection of objectives would be dependent on each activity.

1/ There is, however, a limitation in the establishment of these observable and appraisable objectives: any external observation is always partial and limited in terms of time; only the individual or the community participating in an educational programme is in a position to know the whole of his experience and consequently to evaluate it in all its complexity. From this stems the advisability of duly pointing out the manner in which the educational process may contribute to making the participant aware of the over-all consequences of his own experience, and how and when auto-evaluation should operate.

Curricular programming will be based on the investigation of the local realities and on the study of the needs, interests and objectives of the people involved.

For the integrated study of the prevailing realities, the community could and should receive guidance and assistance from technical specialists in differing fields. Within these purposes, identification of the basic educational needs will in itself constitute a relevant feature in curricular development.

In the light of its problems the community proposes firm objectives which it believes it can reach relying on its own resources and with others which it may be able to obtain. These objectives will be progressively more ambitious as the level of their aspirations grows -which should be a result of the educational and participation process applied.

These firm objectives set for itself by the community five rise to a combination of educational demands of a very varied nature. In response to them the intervention of all sectors and levels should converge in order to give integrated attention both to the specific needs in each field and to those relating to each group, by age or interests.

The need will consequently arise for certain school and out-of-school activities, projects, training operations, learning processes and a considerable variety of educational and cultural activities which it will be necessary to promote, encourage and, in some instances, help to programme.

The treatment of these aspects within the community curriculum cannot be foreseen in detail since they must be dealt with through the medium of various educational forms and methods and with the participation of educational agents drawn from the various institutional sectors involved. This will cause a close liaison between teaching, motivation and promotion.

In so far as the educational system is concerned, to the extent that it is sensitive to the community's objectives, and responds with programmes integrating its own activities at each level and field of study for the achievement of those objectives, an effective education-community relationship should develop. In this manner the educational contents will prove both functionally and socially useful.

In the establishment of new curricular objectives, care will be taken to see that the educational process effectively operates in the light of the interests of the population groups. For this purpose it will not be sufficient to address questions to the members of the community; the planner must work with them and identify himself with their living conditions.

Finally, it is necessary in the process of programming contents, to take particularly into account the conditioning factors in the rural area and the special features of out-of-school or non-formal education (adult education, worker training, youth organization, etc.). Curricular programming should not be limited to the formulation of the subject fields since this would tend to make educational work appear over-concentrate on the schools. The process should be conducted in such a way that the characteristics of the community curriculum, based on the growing and organized participation of the people, are duly considered.

c. The Programming of Human Resources required for the development of an integrated curriculum such as that referred to, implies reconsideration of the traditional concept of teacher training. The fulfilment of various tasks calls for the employment of human resources differently trained but with a homogeneous outlook.

In this stage of programming, a first step will be to draw up -on the basis of the programmes of attention to the population and of contents and methods- a specification of the professional qualities made necessary by the new requirements, and in particular those arising in the learning processes. The different professional situations will be grouped by categories, since education in rural areas is not an exclusive responsibility of the teacher and the school. Consideration should be given, among others, to the following participants and their respective duties:

i. The teacher, entrusted with school education programmed in accordance with integrated rural development and in intimate association with the community.

ii. Those responsible for out-of-school educational work carried out within the community, who may be artisans, farmers. etc, representatives of other institutional sectors -technical specialists, welfare workers, medical assistants, etc., or representatives of the education sector itself- monitors, motivators, etc.

iii. Specialists in the fields of educational research, planning and administration whose orientational and promotional duties are of particular importance in the tasks of programming and executing educational activities. Included in this category would be a new type of supervisor responsible for giving technical guidance to all the personnel engaged in educational duties in school or out-of-school, and whose duties would be broader than those traditionally assigned to the school supervisor.

In the smaller rural communities, lacking in services and where there is generally only one teacher, the integral approach is even more necessary. At this level and under these conditions it is appropriate to think in terms of a versatile educational agent, whose personal characteristics and aptitude to achieve easy communication with the community should be taken into account in the definition of his professional qualities.

After having examined the categories of personnel needed, a description of each position should be drawn up showing the duties to be performed and the prior training and experience necessary to fulfil them. The operational objectives for each professional situation should then be formulated, ending with a description of the content units and of the strategies to enable the achievement of each objective.

As regards teacher training, the quality and level of the training process depend in general on the training institutions employed. There are two well-defined situations in this respect: in some countries it is considered necessary to train teachers separately for the rural and urban areas; in other countries the training of a sole type of teacher, capable of working in any area of the country, is preferred

In any case, if it is intended that education should contribute to integrated rural development, the training of teachers, whether carried out in teacher training colleges or universities, will have to consider inclusion of fresh theoretical and practical features in the curriculum. Similarly, the training of administrators, supervisors and other specialists should take into account the duties which these educational agents will be required to perform in accordance with the concept adopted. For this purpose training will be given not only for the duties of the post itself but also for effective incorporation into tasks relating to rural development.

d. The Programming of Technologies and Instructional Materials necessary for educational work in rural areas should be carried out with reference to the educational objectives established and taking into account the characteristics of the population and their degree of participation in the process. In particular, it should be stressed that this programming task cannot be carried out independently from the programming of contents and of human resources.

In general lines, mention may be made of some characteristics which are common to the rural population, especially to the peasantry, which provide a reference framework for guidance in the selection of technologies and materials. A particular characteristic of the country dweller is his considerable common sense and practical reasoning power; on the other hand his growing wish for change is evident especially when it realistically meets his needs and possibilities. The country dweller has his own methods of production and organization; his life style is totally different from that of the city dweller and his prospects also differ.

The rural population is not, however, homogeneous: it includes groups with higher living standards already receiving educational attention and having access to credit, agricultural extension and other services; middle-income groups; low-income groups with little or no access to services or means of production; and disadvantaged groups, with neither land nor work. The quality of life, education received and cultural level are also factors to be taken into account in the programming of technologies.

All these circumstances point to the need for an adequate knowledge of the population and its characteristics, especially of its cultural level, which should be understood and taken into account when formulating proposals in connexion with the use of technologies and the preparation of instructional materials. This knowledge may be acquired through studies and investigations made with the active participation of the community.

It is also of interest to have knowledge of certain characteristics of the programme area such as the spatial distribution of population, the existing infra-structure, the production and marketing systems, and the means of social communication already available. All these features will provide guidance for the purpose of defining the technologies to be used.

On the basis of the foregoing, it may be found advisable to carry out certain educational activities with the support of radio or television. An examination should first be made of the technologies which it is advisable to employ in each case, or the combination of them judged to be most advisable, consideration then being given to whether they already exist in the area and could be used for educational purposes. If they prove insufficient, the additional requirements will then be specified.

Criteria and forms of utilization should also be established such as, for instance, in the case of radio, setting up processes for transmission, feedback, transmission in answer to feedback, and evaluation. Care will also be taken to ensure the appropriate integration of human resources and technologies; for this purpose it will consequently be advisable to determine with precision the categories of human resources necessary for this work.

Programming should also give consideration to maintenance methods to ensure the uninterrupted operation of the technologies adopted.

Finally, it is thought advisable to list hereunder some criteria to be borne in mind in the use of technologies and instructional materials.

i. Programming will be carried out endeavouring to make maximum use of local resources.

ii. It should be sought to integrate the technical specialists of other institutional sectors operating in the rural area through the drawing-up of common objectives, joint programming of work and of the strategies to be followed,as well as the co-ordinated application of resources at the local level.

iii. It should also be sought to integrate the efforts of various central or regional agencies in the joint preparation of materials; but in such a manner that the participation of the community is facilitated in the adaptation of those materials to the area.

iv. Evaluations should be prepared, of both a quantitative and qualitative character, determination of the costs and effectiveness of the technologies and materials employed and verification of the degree of fulfilment of the main objectives.

v. Since the rural population situations are very varied, priorities should be established for action and therefore for the allocation of resources, taking into account the costs involved and the economic and social benefits which may be generated.

vi. In order that the programmes may reach a greater population coverage, use should be made of the mass communications media, especially of radio transmitting stations, to give support to the whole of the joint programming established. As far as possible, preparation of the materials should be of a regional nature.

vii. Mechanism and methodologies should be set up to encourage the horizontal exchange of experiences with a view to capitalizing, for the solution of common problems, the favourable and unfavourable aspects observed in the use of technologies and materials in similar programmes and regions.

viii. It is advisable to point out that the technologies and materials used for teaching and learning should not be over-estimated; the latter are instrumental media directly associated with the objectives and the defined educational contents.

To sum up: resort will be made as far as possible to relatively simple technologies, of low cost, which involve the use of local resources, applicable on a small or medium scale, with a high utilization factor, and which are compatible with the ecology and the socio-cultural patterns of the area.

e. Programming of the Physical Infra-structure and Equipment for educational purposes in rural areas cannot be regarded as a stage in the planning process comprising the receipt of information, its transformation and transference to a subsequent stage. The ties and dependencies of the process operate in many directions and over different time periods, and require the interdisciplinary teamwork of educators, engineers, architects and educational administrators in constant contact with the community and its representatives. For this reason it is necessary to draw up and disseminate operating manuals which, in using simple and readily understandable language, may encourage the rural communities to participate in this task in order that their aspirations, values and customs are considered in the physical planning process.

The programming of physical spaces is a process of conversion of functional requirements into necessities of space. In the case of the programming of physical spaces for education in rural areas, the aim is to examine the educational functions, fundamentally on the basis of the programming of contents and of the options of attention to the population, and translate them into appropriate surroundings favourable to the educational process within the framework of integrated area development. The new methodological approach in effect confers on this task characteristics which differ from those traditionally adopted. The concept of physical space, normally referring to individual buildings, should be extended in the rural area to a combination of buildings conforming systems or concentrations within a given territorial continuity. Though separated one from another, these buildings will constitute an organized, coherent and dynamic whole, enabling the achievement of better levels of performance.

The programming of physical spaces should not be limited to those of a strictly educational nature; it should also embrace other spaces in the community area which may potentially afford possibilities for the development of continuing and active education. The educational spaces should, in turn, provide a fully satisfactory service for their purpose, including aspects such as health, food, work and recreation, contributing to an improvement in the living standards of each community.

The programming of physical spaces is based on two classes of analysis: the qualitative analysis which enables the physical spaces to be defined and to characterize them in accordance with their functional potential; and the quantitative analysis which determines their localization.

In the first case the analysis is based on the programming of contents, human resources and technologies and, after grouping the activities by their affinity in the use of space, proceeds to formulate a list and description of the types of physical infrastructure required.

In the second case, in order to quantify the spaces required, an inventory of the existing scholastic establishments is drawn up, including their state of preservation; a scholastic map is then prepared and the delimitation of the coverage of each nucleus is established taking into account the effect of an

educational centre. The indexes and occupational capacity of the physical spaces is then formulated, based on the forecasts of population to be attended; and finally, the indices of utilization of space in terms of time are prepared and the number and type of necessary spaces is calculated.

Programming should be flexible in order to enable school and out-of-school activities to be grouped in different ways, providing suitable solutions to the various situations which may arise in the rural area. For instance, the education-labour relationship may be examined considering the places of work as potential educational spaces; similarly the educational spaces may be used for community or work activities.

Due to demographic and economic factors, as well as the difficulties of communications characteristic to the rural areas, the solutions in terms of infra-structure in such areas must be different from those applicable to urban conditions. An alternative which is beginning to arouse interest consists of integrating various functions in a sole architectural complex known as a "rural centre". Such a centre may include, either under one roof or in a group of buildings, several services such as education, health, public administration, telecommunications, banking, recreation and other. Whereas this alternative poses no problems from an architectural point of view, in terms of administration it involves an effort of integration, not only physical but also functional, on the part of the various institutional sectors operating in the rural area.

Finally, the importance should be pointed out of appropriate training of architects, teachers and administrators in the comprehension of the role of education in relation to rural development and the role of educational physical space in this context.

f. The Programming of Educational Administration should lead to the formulation of an institutional model capable of effectuating the proposed structural changes for education in the rural areas and the anticipated developments relating to expansion, contents, methods, use of technologies and participation of the community in the educational process. This programming task concerning administrative changes involves determination of the characteristics and mechanisms necessary to ensure co-ordination within the education sector and between this and other sectors. The new organization will also ensure decentralization from the national level towards the regional area and local levels, both as regards decision-making and planning, execution, control and evaluation of programmes. Consolidation, which represents one of the propelling elements in integrated rural development, tends to favour this decentralization process, as does intra- and inter-sectoral coordination. This programming stage will consequently also include determination of the operating methods of consolidation through the design and implementation of new organizational forms and models. In this respect the creation may be programmed of centres and programmes providing different levels and methods in the educational system and combining in-school and out-of-school forms in the same physical unit or in others of a complementary nature in order to ensure the equality of opportunity. In this connexion, the different educational levels, from initial or basic to adult instruction, may be provided in a sole communal educational centre, with reliance on the participation of the community and of other institutional sectors.

The services responsible for planning should also be defined at this stage, as well as those for educational execution and evaluation at the area level. The technical personnel requirements should also be established, and the duties they should perform in the new institutional model.

But the institutional changes will not become possible if existing realities are not appropriately taken into account. In this respect there is never a start from zero; situations may be found which only call for a rearrangement of existing administrative elements. Of importance, therefore, is the prior examination of prevailing legislation, and of planning, programming, financing, execution, evaluation and the control of education in the programme area in order to ascertain where and to what extent obstacles to the proposals of change may be encountered.

Before giving final form to these proposals, the following guiding principles should be taken into account.

-The promotion of decentralization and/or dispersal which may facilitate preparation of the programmes, the adoption of decisions and carrying out of activities at the community level. In other words, the administrative set-up should be strengthened and broadened at its base, and restricted as the scale rises; namely, it should develop from the bottom upwards.

-The achievement of a certain degree of consistency in the policies and objectives of the various institutional sectors operating in the programme area, and of a level of co-ordination enabling joint action to be taken by the sectors with a view to a greater rationalization and better use of human resources, materials and available finances. It is of the greatest importance in this respect to define the mechanisms of integration and co-ordination within the education sector itself and at the inter-sectoral level with the purpose of ensuring the participation of the different individuals and levels concerned with development of the area.

-The encouragement of participation by the rural communities in the making of decisions and execution of the programmes.

-The achievement of greater administrative flexibility, agility and vitality favouring a continuous and active process in the execution of activities and the introduction of the necessary changes.

Of particular interest in this respect is the configuration of an administrative structure enabling the application of a dynamic curriculum adapted to each real situation and facilitating the adoption of calendars and working hours appropriate to the particular nature of each region or area.

-The stimulation of understanding and sensitivity on the part of those responsible for administration as regards the anxieties and needs of the country people and of teachers. For this purpose, the establishment of specific mechanisms is recommended for the identification, enlistment and training of human resources favourable to local development.

-The appropriate application of these objectives calls for consciousness on the part of all those involved in the administrative process of the role they are called upon to perform, a capacity to understand and carry out the necessary changes and a feeling of involvement in the realization of the proposed objectives.

-The setting up of an institutional model capable of establishing the changes in the rural area within a short period of time is a complex task, especially in the light of the particular connotations and characteristics encountered in each country. Solely by way of conclusion, it should be pointed out that, in order that an institutional model of this kind may prove operative, it must contemplate:

-The establishment, at the central level and also at the regional, sub-regional and local levels, of a co-ordinating agency enabling the integration of activities and optimization of human resources, materials, and financial resources, without limiting the scope of institutional aims.

-The need for their own autonomous organizations in each of the participating communities, independent of the public sector agencies, to examine, discuss and decide on the activities and forms of work for the solution of problems and attention to the basic needs of each population group. In this respect it is recommended that the public sector should become a promoter and animator of community organization for the participation of the rural population in the solution of its problems.

g. Financial Programming. This consists of two parts: one concerned with establishing the annual requirements of resources for educational investments and operating expenses in the programme area for the period of the plan; and the other which studies the financial flow needed to cover requirements in accordance with the various sources of finance.

Bearing in mind that this stage of programming seeks precisely to determine the cost of the plan and the availability of resources for education in the rural area, it is suggested that an input-cost concept be used, the latter being understood as the cost of the inputs used in accordance with a particular combination in a given period and with a pre-determined educational purpose, taking into account the various sources of finance including those of a non-traditional kind, and the various forms of self-financing.

For this work it is fundamental to consider as a base the educational scheme proposed for the area and resulting from previous programmings, examining all its implications: the rhythm of coverage, requirements of human resources possessing the necessary qualifications for the new system, technological elements, physical infra-structure and equipment. The timing of the various programme items should be precisely established and the net financial aggregates arising from the changes in the system calculated accordingly.

Possible contributions by the community should be taken into account, either in the form of labour, funds or specie. For this reason, and also because the plan will no doubt involve significant educational changes, the information regarding historical costs, while representing an indispensable source for the preparation of estimates, should be duly adjusted and used with the necessary discretion.

One of the most sensitive aspects of the programming task consists in reviewing and re-formulating options in accordance with the estimates of the financial resources needed and their actual availability. Worthy of attention in this respect is the necessary integration of the activities of the institutional sectors and the community for a better employment of available resources and of the potential contributions from the people and institutions involved.

In the identification of sources of finance 1/ it is important not only to consider those needs of a traditional kind, but also others, such as:

-Sources in the Public Sector, for instance those entailed in sectoral programmes with an educational content, inter-sectoral development programmes, state, provincial and municipal resources with educational implications, and resources generated within the education sector itself.

-Sources among institutions and agencies in the private sector, such as secular and religious bodies, agricultural and livestock enterprises, co-operatives and others.

-Sources originating in the community itself, consisting of labour, provisions in kind and operational contributions.

-Own resources generated by productive activities carried out in educational centres.

The following steps may be followed in financial programming:

-Drawing up of guidelines or directives for the organization of the financial system.

-Estimates of cost of the plan for the programme area.

-Detail of the cost structure.

-Detail of sources of finance.

-Other aspects to be defined in the financial programme such as the remunerations system, administrative costs, attraction of non-traditional supplementary resources, and self-financing options.

The following points contributing to achieve the objectives are also suggested for consideration at this stage.

1/ The fact that the identification of sources is mentioned at this point does not exclude the possibility that in the phase of examination of the rural realities a balance of financial possibilities may have been drawn up. In this event it would be advantageous to have available a framework of financial feasibility at the time of formulating the educational structures.

a. the need to rationalize the use of resources from the various sources;

b. the application of priority criteria in accordance with the plan objectives;

c. the necessary participation of the community in the administration of resources;

d. flexibility in the management of resources, which should not be irrevocably linked to particular items in order to achieve their better utilization;

e. existence of a specific allocation of resources for the programme area.

5.2.8 Strategy for the Implantation of the Plan

The programming stages already mentioned may be dealt with in a particular sequence or simultaneously depending upon many factors of an institutional, temporal or financial nature, and also on the quality and quantity of the available basic information. In any case, certain tasks should be attended to at the outset since they provide reference information for the fulfilment of others. Thus, for example, programming of the contents and of the options for educational attention set the pace for the programming of human resources, technological support, and of the physical infrastructure and equipment, these combined factors being determinative in the task of organizational and financial programming.

The combination of programmes constitutes, in its turn, the starting point for formulation of a strategy for the implantation of the plan. This decisive stage in the planning process 1/ consists fundamentally in identifying those political decisions which should of necessity be adopted to overcome the main obstacles which may be met by the plan. It frequently occurs that technically well drawn-up plans fails to reach the stage of execution due to this aspect having been overlooked.

The steps which it is advisable to follow in formulating a strategy for the implantation of the plan are as follows:

i. To identify the basic proposals drawn-up in the stage of programming as regards the educational structure, contents, population to be attended, resources and organization.

ii. To identify, based on each of those proposals, the main limiting or favourable features which may affect their fulfilment such as legal, political, institutional, informational, financial, technical or cultural factors.

iii. To examine the relative influence of the different limiting and favourable aspects, and establish a balance of the possibilities of implementation for each proposal.

1/ See: Curso de Planejamento e Administração da Educação para o Desenvolvimento Integrado das Areas Rurais (Course on Educational Planning and Administration for the Integrated Development of Rural Areas). "Estrategia de implantação de plano" (Strategy for Implantation of the Plan). MEC/SG/Unesco, Rio Grande do Norte, 1976.

iv. To determine new developments which may be necessary for the implementation of the basic proposals, in the fields of legislation, institutional structure, information system, allocation of resources, and training and recruitment of human resources; or the measures which should be adopted in the light of certain cultural features, traditions or possible pressure groups.

v. To identify the key decisions and/or specific projects which may ensure the plan's success, such as new legislative projects, institutional decentralization, the creation of an information system, training of human resources, dissemination of the plan, mobilization in its favour, and meetings with teacher and administrative personnel in the education sector to enlist their support for the plan.

vi. To carry out successive adjustments to the plan in response to the actual results being obtained.

For the purpose of identifying the basic proposals and the restrictive and favourable factors it is recommended that a reference table such as that shown on the following page be employed. After entering the basic proposals within each phase of programming (first vertical column) the analysis is recorded horizontally in the table as regards each of the proposals listed.

5.2.9 The Formulation of Projects 1/

Programming establishes a global framework of time, objectives and resources which it is necessary to materialize and to express concretely in order to secure the maximum co-ordination and best possible use of available means. The projects represent a first disintegration of the programming process and through them it is sought to implement activities considered in the programming stage which show some degree of homogeneity, with a view to fulfilling particular objectives.

A project may be directed to the solution of physical aspects such as the infra-structure or radio-telegraphic installations, the training of human resources, the establishment of the new institutional system, etc.

The scope of the project will be determined by the need to achieve the objectives within the established deadlines.

All projects may in their turn be disintegrated into sub-projects of greater operational precision depending upon the specific circumstances of the programme area in terms of geographical, financial, technical and other aspects.

In the same manner as a project may support several programmes, it is understood that a sub-project may similarly serve several projects. Thus, for example, an information sub-project may simultaneously serve a project relating to the training of human resources and also a research project.

1/ See: Curso de Planejamento e Administração da Educação para o Desenvolvimento Integrado das Areas Rurais. (Course on Educational Planning and Administration for the Integrated Development of Rural Areas). Formulação e elaboração de Projetos. MEC/SG. Rio Grande do Norte, 1976.

TABLE II

REFERENCE TABLE FOR THE ANALYSIS OF STRATEGIES

Basic Proposals	Limiting factors								Favourable factors							
	Legal and/or political	Institutional	Information system	Financial resources	Technical resources	Human resources	Culture and traditions	Pressure groups	Legal and/or political	Institutional	Information system	Financial resources	Technical resources	Human resources	Culture and traditions	Pressure groups

To ensure the success of the plan as a whole, identification and formulation of the various projects and sub-projects should be carried out in a co-ordinated manner.

It is similarly important to establish clearly the distribution of responsibilities in the various activities to be undertaken under each project or sub-project.

In the formulation of the various projects and sub-projects, the following should be specified:

i. Its justification

ii. Its objectives and targets

iii. The activities to be undertaken and their timing

iv. The allocation of responsabilities and other organizational features, which at all times should take into account the participation of the community and of the various sectors of economic and social activity.

v. The allocation of human, material and financial resources.

vi. The mechanisms of control and evaluation.

5.2.10 Control and Evaluation of the Planning Process

Every plan requires a system of control and evaluation in its various stages of preparation. In the case of planning for rural areas the process of control and evaluation becomes even more necessary due to the multiplicity of participating institutions, the many activities whose execution depends on assistance by the community, the limited communications facilities available in general, considerable geographic dimensions, problems of a climatic or topographical nature, and even the low prevailing educational levels.

The community and its representative bodies have a very important role to play in this task. For this reason, effort should be directed, rather than to the establishment of technical mechanisms, to the organization of the community for their effective participation in the control and evaluation of the planning process.

6. ELEMENTS FOR THE FORMULATION OF AN EDUCATIONAL STRATEGY FOR INTEGRATED RURAL DEVELOPMENT 1/

Strategy is commonly interpreted as the art of directing the operational activities or combinations of activities which are to be promoted or developed in order to achieve particular objectives or targets. Insofar as education in rural areas is concerned the final objective will be to animate and stimulate integrated rural development from the educational sector and ensure that education fulfils its proper role in such areas.

In general it may be said that it is not possible to formulate a common strategy for all countries of the region since situations differ between various geographical areas in each country.

Where there is a firm resolve at the national level to apply orientations and methodologies for education in rural areas such as these here proposed, and when policies are formulated and significant resources assigned to the achievement in the medium term of an effective change in those areas, the analysis of strategies may be confined to consideration of the more general aspects. On the other hand, where these circumstances do not apply, the analysis must be considerably more painstaking.

Whichever the circumstances, however, the following fundamental considerations should be taken into account in formulating an educational strategy for integrated rural development:

i. The directives should be based on the very concept of integrated rural development.

ii. The specific nature of education for rural development stems from a concept and from communitarian features rooted in the interests, needs and problems of each population group; from a form of educational activity that promotes and invigorates an analytical, critical and innovative spirit and a readiness for constant change in the rural communities, and from the growth and development of educational aims through all possible forms and means.

iii. It is necessary to think in terms of participatory planning generated at the level of the population groups and grassroots organizations themselves, applicable at the local or micro level, interdisciplinary and inter-sectoral in nature -the various institutional sectors pursuing similar objectives- relatively unsophistica and at the same time realistic and envisaged in such a manner that the effective participation of the community in all its phases is secured.

1/ Regional Workshop on Educational Planning Methodology for the Integrated Development of Rural Areas (Brasilia, 6-10 November 1978). Informe Final (Final Report), OREALC/SEC, Santiago/Brasilia, 1978. See; in particular section 5.4 of that report which refers to a proposal submitted by Mr. Gustavo López Ospina, Representative of Unesco in Brazil, regarding educational strategies for integrated rural development, the essential contents of which are reproduced in this section of the present document.

iv. The planning methodology should be open and flexible, without however sacrificing a degree of technical rigour. The basis for its development and application would be the rural population itself as holding responsibility for the coherence and articulation of the process at the local level. To the extent that may be necessary, the techniques and planning instruments used at other political and administrative levels should be adapted.

v. Among the more salient consequences of this type of planning are: a) the organization of the rural communities; b) the possibility of making available to the communities definite instruments for participation, such as information and credit; c) broad decentralization in the allocation and use of resources of all kinds.

vi. Based on this new concept, fresh requirements also arise in terms of the necessary human resources. In this respect it is necessary to stress the role of the subject of education -namely the country dweller and his family- rather than that of the technocrat who in this instance becomes a simple collaborator in a process which should be controlled by the population groups in the rural areas.

vii. Questions also arise which should be answered at this stage, such as the effectiveness of the present planning process in the region, its degree of consolidation, the relationship between periods of government and plans, linkages with the outside world, the possibilities of change between the periods considered in the plans and the relationship of these with specific programmes, projects and activities.

For the purpose of formulating a strategy such as that outlined, it is suggested that use be made in each case of the table shown on the following page, in which account is taken of the main dimensions to be considered and the central aspects relating to education and the planning process.

Within this strategy, emphasis is laid on the utopian dimension, namely the maintenance of a positive technical posture in the implantation of principles, objectives and targets which, in view of current circumstances and limitations, are seen to be projected forwards in time to periods difficult to establish or visualize. The value of this dimension is also seen in the maintenance of a view of the future to be faced by education in rural areas in forthcoming years. At the same time, the utopian dimension will contribute to the development of a dynamic function and of a relationship between what may be done in terms of the proposed change at the present time and in the near future, and what should be achievable if all the implications of such a dimension are fulfilled.

As shown by various experiences and projects, there are several ways of achieving the same objectives. What may be most significant and feasible for initiating a process of change in one country may be the most negative in another. It is possible that comparable results may be achieved in both cases by different routes in the same periods of time. In pointing out this circumstance it is intended to draw attention to the fact that in the formulation of a strategy the central requirements are inventiveness, opportunity and taking advantage of existing gaps, rather than expecting at the outset to bring about an integral change in the systems through the application of procedures or of legislative action, as if the mentality of a people or the implantation of a notion of development such as that here suggested were to be attainable through resort to bureaucratic methods.

TABLE III

ELEMENTS FOR THE FORMULATION OF AN EDUCATIONAL STRATEGY FOR INTEGRATED RURAL DEVELOPMENT

Central Aspects / Dimensions of the Strategy	Political	Technical	Administrative	Utopian
I. Levels of Activity of Planning and Planner A. National-federal B. Regional C. State-provincial D. Municipal E. Local-micro				
II. Basic Planning Principles A. Participation of the population B. Inter-sectorality				
III. Basic Educational Principles A. Community education B. Use of all means and forms (technologies)				
IV. Establishment of Priorities A. Based on the present situation in the rural area B. Based on activities of greater multiplying effect				

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